

OUTSTANDING CHAMBER OF THE YEAR AWARD

Presentation at the ICEA Annual Conference

Chamber of Commerce: One Southern Indiana (1si)

Nominated By: The Amazing Team Members of 1si

Address: 4100 Charlestown Road, New Albany, IN 47150

E-Mail: Wendy@1si.org Website: www.1si.org

Number of Members: 1,068 (pre-COVID) Number of Employees: 12 FTEs (pre-COVID)

In all cases, use the most current completed fiscal year as the time period in question.

Membership Classification

Fewer than 500 Members

500 – 1,000 members

More than 1,000 members

Chamber Budget Size

Less than \$250,000

\$250,001 - \$500,000

\$500,001 - \$1,000,000

Greater than \$1,000,000

Leadership & Governance (15 points)

Provide examples of the following and limit essay responses to 1 page or less:

Mission Statement

Strategic Plan

Organizational Chart

ESSAY: How has your chamber demonstrated leadership in your community?

ESSAY: What efforts has the chamber undertaken to enhance the level of business activity or commerce in your chamber service area?

Finance (15 points)

Provide examples of the following and limit essay responses to one page or less:

Operating Budget

Financial Statements

ESSAY: How has the chamber planned for future financial management?

Advocacy (35 points)

Provide examples of the following and limit essay responses to 1 page or less:

Press Releases, Published Articles, letters to the Editor or other examples of the chamber's advocacy activity

ESSAY: What are the advocacy priorities for the Chamber?

Programming & Membership Development (35 points)

Provide examples of the following and limit essay response to 1 page or less:

Newsletters, magazines, e-mail bulletins or other communication samples

Chamber promotion or membership recruitment examples

Number of members at the beginning of the year: 1,068

Number of members at time of application: 1,047

ESSAY: What was the Chamber's strategy for recruiting and retaining members in its last fiscal year?

ESSAY: How has the Chamber used volunteers, incentives, or goals to assist in membership development?

ESSAY: What new or innovative services have the Chamber created to attract, retain, or serve members?

Promotional Information

Name of Board Chair: Jason Lopp, Attorney at Law

Organization: Church, Langdon, Lopp & Banet, LLC

Address: 318 Pearl Street

City, State, Zip: New Albany, IN 47150

Preferred Media Contact (additional media contacts can be attached):

Contact Name: Bill Hanson

Media Name: News & Tribune

Address: 221 Spring Street

City, State, Zip: Jeffersonville, IN 47130

E-Mail: bill.hanson@newsandtribune.com

Nominations are due by June 10, 2020

Submit nomination by e-mail to info@iceaonline.com and mail the \$60 non-refundable \$60 application fee to:

**ICEA • P.O. Box 377 • Hanover IN 47243
(e-mail) info@iceaonline.com • (tele) 812-871-3000**

Media Contacts cont.

Louisville Business First
Marty Finely
502-498-1942
mfinley@bizjournals.com

Louisville Courier Journal
Maggie Menderski
MMenderski@gannett.com

Mission and Vision



One Southern Indiana (1si) is the Lead Economic Development Organization (LEDO) and Chamber of Commerce for Clark and Floyd Counties on the Indiana side of Louisville, Kentucky. 1si proactively works to grow our regional economy through business attraction, retention and expansion; through encouraging and supporting entrepreneurs and workforce development; and through providing government and workforce advocacy, business education, networking opportunities and other business services to our members and investors.

Our Mission

To help businesses thrive in the Southern Indiana and metro area.

Our Vision

That our Southern Indiana region will be economically strong, and all businesses will flourish; providing viable jobs, prosperity, and quality of place.

1si Strategic Plan – 2020 and Beyond

Greetings!

On behalf of the board of directors, investors and staff of One Southern Indiana (1si), it is my pleasure to introduce to you our organization's **1si Strategic Plan—2020 and Beyond**. This document was developed to help guide and direct our activities, as well as the allocation of our resources, so that we can provide positive impact to the economy of our communities and the regional economy in which we operate.

1si was formed in 2006 as the chamber of commerce and economic development organization serving Clark and Floyd Counties. Since our last strategic planning effort in 2013, 1si has organized its work around six strategic focus areas to best achieve our mission and create the most impact in our communities. As work toward these strategies continued, two key strategic initiatives emerged – one as an opportunity and one in response to a threat – and we adapted our structure and focus to address them within the framework of our Strategic Plan: Regional Development and Talent Development.

In 2017, the 1si Board of Directors charged forward by asking our stakeholders to look ahead – to 2020 and beyond – to help chart the course for our adaptation to better meet the changing needs of the business community. Throughout the year, members, investors, elected officials, partners and other stakeholders were asked to share their input on the future initiatives of 1si. This document reflects the ideas, concerns and enthusiasm expressed in over 20 facilitated conversations.

We hope that as a supporter of 1si, you will find value in this **1si Strategic Plan—2020 and Beyond** as it sets the path on which we will travel together to improve the economic viability of Southern Indiana. We will continue to deliver annual work plans with action items that will be accomplished and our progress toward our strategic objectives will be tracked quarterly and reported annually.

By working together, we will achieve the mission and vision we have established for our communities.

Sincerely,



Wendy Dant Chesser
President and CEO

History of Organization



In 2005, leaders in both Clark and Floyd counties volunteered their time to discuss the need for a plan that would help ensure a viable future for Southern Indiana. Driven by a desire to implement change that would establish stronger economic growth, a better educated and better paid workforce, and a structure of advocacy within the State of Indiana, the boards of Southern Indiana 2020, the Southern Indiana Chamber of Commerce and the Southern Indiana Economic Development Council came together to form an organization that speaks with one vision and one voice.

The new organization, One Southern Indiana, Inc. (1si), was official on July 1, 2006 and has become a more aggressive resource to the business community and government leaders in building on the strengths and vision of all three predecessor organizations.

Proudly, 1si works with both large and small businesses. We offer services such as new business attraction, retention and expansion of existing business, networking opportunities, workshops and educational programs and events geared for the business professional.

1si is an advocate for the local business community. Through engagement at all levels of government, 1si is building a reputation as the primary advocacy resource for members, for the region and for key decision makers. We support public policy that facilitates high wage/high skill job creation, entrepreneurship, capital investment and existing business retention and expansion. We also support actions that contributes to a strong quality of life that attracts and retains jobs and investment.

To achieve our mission and vision, we collaborate with many partners representing private businesses, not-for-profit organizations, public entities and learning institutions. One primary partner is the OSI Foundation, Inc., which is an Indiana not-for-profit charitable organization established to operate exclusively for the benefit of, or to perform the functions of, or carry out the purposes of economic development. The OSI Foundation is the receiving entity for any grant funds and investments to support economic development activities. The OSI Foundation is a tax-exempt organization and operates under its own Board of Directors.

Executive Summary



This *1si Strategic Plan—2020 and Beyond* provides for our organization the necessary components to set our organizational direction, what we will address, and guidelines on how we will operate.

Mission/Vision: The 1si Board of Directors revisited our Mission and Vision statements and updated both to reflect the desired outcomes of our work. Moving forward, 1si will work toward the following Mission and Vision.

Mission: To help businesses thrive in the Southern Indiana and metro area.

Vision: That our Southern Indiana region will be economically strong, and all businesses will flourish; providing viable jobs, prosperity, and quality of place.

Strategic Focus Areas: The *1si Strategic Plan – 2020 and Beyond* for One Southern Indiana consists of six Strategic Focus Areas in which our work will be concentrated, communicated and measured. Staff will develop annual work plans in this framework, which will include action items, contributing partners, target completion dates and metrics of success for each work initiative prioritized for each year.

These Strategic Focus Areas include:

Growth through Economic Development

Economic development is the priority for many 1si investors. The goal of this strategic focus area is to enhance the area's vibrancy by facilitating economic transactions that generate wealth and add to community prosperity. Economic development initiatives build healthy economies and opportunities throughout Southern Indiana that support a stronger community at large, while increasing the overall standard of living of residents throughout the region.

1si will continue to facilitate agreement on annual work strategies and key initiatives, and through collaborative execution, establish metrics and measure our results in the areas of full employment, an expanded tax base and economic self-sufficiency for individuals and communities.

WorkHub: Cracking the Workforce/Talent Code

Since the end of the Great Recession, the Louisville MSA has seen an annualized decline in the unemployment rate. This trend is not unique to our region, and many factors – including strong business growth, a declining workforce participation rate, and retirements of baby boomers – contribute to the tightening labor force. A low unemployment rate is good for area residents, but also concerning for businesses struggling to fill positions or expanding to take advantage of new opportunities.

Through the WorkHub initiative, 1si is working to develop tangible programs centered around needs of the job provider. We strive to be the voice of the demand side – or employer side – of the supply-demand equation. We continue to work with resource providers on the supply side to improve the balance and match the supply side skills with the needs of the demand side. Ensuring business vibrancy in the community cannot be done without a sustainable pipeline of talent for growing businesses.

Serving our Members through Business Resource Services and Programming

Existing businesses create a stable environment by providing jobs for area residents, opportunities for local business-to-business commerce, consumer goods and services, and support of community activities. Notwithstanding these community benefits, local businesses drive wealth creation for the owners and employees. For these many reasons, the 1si Business Resource Team comprises much of the organization's visible work.

Business resource services at 1si include our education, networking, advertising and promotional activities. The purpose of these activities is to attain, retain and engage members in 1si to help empower our local businesses.

Providing Catalytic Leadership

The role of 1si in promoting a fiscally-stable, business-friendly environment transcends local, regional, state and national issues. Our members and investors support our leadership as a change agent to further our organizational mission. Through our leadership and advocacy initiatives, we promote positive change by serving as the "Champions of Ideas" to achieve economic and business vitality for the region. Additionally, we strive to provide for our investors and members access to policy makers through forums, roundtables and one-on-one meetings.

Collaboration for Regional Prosperity

Collaboratively solving problems of the region enhances the overall attractiveness of our communities, which in turn enhances our economic growth competitiveness. Building this type of culture in Southern Indiana will allow residents from all socio-economic demographics to participate and prosper in our regional economy. 1si will coordinate, facilitate and engage in strategic initiatives to maximize transformative activities throughout the region. We will be responsive to issues that have the potential for positively impacting the Southern Indiana region and our neighboring communities.

Organizational Sustainability

In order to lead our community through our big-picture goals and objectives, 1si performs many day-to-day activities to ensure the effective and efficient operation of our organization to serve our business members and investors, as well as the communities in which we operate. The longevity and ultimate effectiveness of these service activities depends upon successful administrative and fiscal accountabilities.

Core Values



In addition to reaffirming our mission and vision and developing the strategic focus areas for our work, the Board of Directors approved six Core Values that provide the guidance for our organization's work.

As a non-profit organization that strives to meet the needs of the business community while also serving the greater good for all area stakeholders and residents, the Board of Directors of 1si renewed our commitment to the Core Values that will guide the organization not only in our strategic direction, but also in our day-to-day operations. In our quest for continuous improvement, our activities will be evaluated with these six Core Values to help us meet the expectations of our members, investors and community stakeholders.

The Core Values for our work are defined as follows:

- Collaborative** – Recognizing that the results we work to achieve have many benefactors, we also recognize that we will see greater success if we work together with our partners toward shared outcomes.
- Proactive** – As business and community leaders, we will work to initiate change for the betterment of our community rather than reacting to what takes place around us.
- Resourceful** – To best respond to the needs of our members, investors and stakeholders, we will apply ingenuity, take initiative, and express our capability in maximizing our advantages and overcoming challenges.
- Inclusive** – 1si creates a stakeholder experience that embraces the entire region – along with its diversity of partners – as individual business members with unique opportunities and distinctions that add to the economic and workforce opportunities for our complete communities.
- Integrus** – 1si will, as an organization, pride ourselves on our adherence to moral and ethical principles as we achieve our work with integrity. We will insist that our partners operate with the same level of integrity that we expect from ourselves.
- Results-oriented** – We recognize that the work we do is important. We will focus on the outcomes that result because of our actions. Our circumstances may change, but our adherence to measurable outcomes will not.

Influencing Factors: The Horizon Report



In 2014, the Association of Chamber of Commerce Executives launched the Horizon Initiative, a study focused on determining the top influences that will affect chambers in the next 10 years. The year-long study found eight trends that will change the way businesses interact with their local chambers and offered suggestions on how local associations like 1si may be able to remain relevant forces in business, as well as capitalize on the trends to enhance membership and increase engagement.

The results were published in 2015 in the white paper entitled, *HORIZON INITIATIVE: CHAMBERS 2025; Eight Influences Shaping the Next Decade for Chambers of Commerce*. Since that time, chambers across the country have begun altering their programs, member benefits and services to better address their members' needs, considering the eight factors noted in the report. Those factors include:

Changing attitudes regarding the **Nature of Belonging and Gathering**, especially as it relates to an increasingly diverse population and the entrance of the millennial generation in the workforce, will need to be considered when structuring membership, member benefits and community relations.

The continuous change in **Technology and Communication** will give rise to an expectation of individualized communication of most messages with original content, so chambers can be seen as a viable, trusted resource.

Business needs and success will be driven, in part, by maximization of natural and human resources, whether in **Scarcity or Abundance**.

While the volatility of the global stage will increase over the next 10 years, both business expansion and chamber growth can be driven by the **Globalization** of business and the nearly limitless opportunities occurring around the world.

The inevitability of **Demographic Shifts** in North America, related to race/ethnicity and to generational transition, will significantly affect chambers of commerce in the next decade and beyond. Building a future-focused chamber without an inclusion strategy would be, at best, unwise.

As **Social and Political Fragmentation** continues to divide people, it is within the battle for solutions and the desperate craving for leadership that chambers will find opportunity to embody "sane middle" pragmatism and reason over dogma.

In order to stay relevant, chambers will need to focus on community and regional causes more so than traditional business services, many of which can be found for free via the internet. This will necessitate a **Resource Alignment** so that revenue raised is allocated toward mission goals.

Chambers will need **Catalytic Leadership** - people who can align all their local forces for the benefit of the "business commons." This is a shared recognition that "... a skilled workforce, an educated populace, vibrant local suppliers, basic rule of law" matter to companies – as well as communities – and can only be achieved through the cooperative efforts of government, education, business and community.

The **1si Strategic Plan – 2020 and Beyond** for One Southern Indiana consists of six Strategic Focus Areas in which our work will be concentrated, communicated and measured. Staff will develop annual work plans in this framework which will include action items, contributing partners, target completion dates and metrics of success for each work initiative prioritized for each year.

Growth through Economic Development

Economic development is the priority for many 1si investors. The goal of this strategic focus area is to enhance the area's vibrancy by facilitating economic transactions that generate wealth and add to community prosperity. Economic development initiatives build healthy economies and opportunities throughout Southern Indiana that support a stronger community at large, while increasing the overall standard of living of residents throughout the region.

1si will continue to facilitate agreement on annual work strategies and key initiatives, and through collaborative execution, establish metrics and measure our results in the areas of full employment, an expanded tax base and economic self-sufficiency for individuals and communities.

Key Elements of our Work in this Area:

- Fostering high wage companies to enhance the quality of life of area residents;
- Retaining commerce by identifying and responding to needs of our existing employers;
- Assisting small businesses;
- Enhancing our existing businesses environment; and
- Marketing to external customers the competitive advantages of our area



Impact of Horizon Influencers:

To be a competitive region for business vibrancy, 1si must:

- Move beyond transactional economic development and strive for true transformational priorities in our work;
- Determine the region's value proposition for retention of existing and attracting of future business projects;
- Better define entrepreneurship assistance, what should be accomplished and the expected returns on investment;
- Understand the ties start-up businesses have to quality of place amenities, as well as technology infrastructure;
- Recognize the ebbs and flows of community attractiveness for business growth to proactively identify new opportunities and survey for threats;
- Understand the shifting global realities and the impacts on local businesses.
- Create stronger ties to talent and workforce availability of community;
- Review diversity with inclusion models to ensure millennials to baby boomers have viable employment options; and
- Balance 1si's resource distribution between business attraction and business retention efforts.

What you will Observe from 1si:

- To assist **existing companies**:
 - * Coordinating the existing Business Retention and Expansion program in which staff conducts visits to at least 230 businesses per year to offer assistance for specific needs and to show appreciation for their dedication to our communities;
 - * Facilitating interactions with local governments, which include managing requests for local incentives, coordinating state incentive processes and troubleshooting concerns;
 - * Managing, hosting and growing the Metro Manufacturing Alliance, which provides a forum where manufacturing professionals can interact, share best practices, learn of new resources and discuss common issues and solutions;
 - * Establishing and coordinating business assistance teams to assist companies in maximizing major opportunities or to help companies in distress; and
 - * Assisting businesses in meeting their talent needs through engagement in the 1si WorkHub.
- To attract **new companies**:
 - * Serving as the state-recognized Local Economic Development Organization (LEDO) for both Clark and Floyd counties;
 - * Managing prospect inquiries, site visits, community tours and detailed requests for information;
 - * Coordinating incentive packages (state and local) to ensure economic competitiveness of our area to close deals; and
 - * Enhancing development of sites and assisting existing facilities to market a variety of available location options as inventory.
- To assist **small businesses** with resources and access to capital by:
 - * Promoting and managing the Horseshoe Foundation of Floyd County Small Business Revolving Loan Fund; and
 - * Engaging these companies in educational offerings to help them grow, maintain and protect their businesses;
 - * Partnering with entrepreneurial resource providers to enhance the development of start-up companies.

How We Measure Success

- Annual increases in the county average wages, which includes increasing low-to-moderate income levels;
The county average wage for Clark County rose from \$19.07/hour (2018) to \$19.74/hour (2019)
The county average wage for Floyd County rose from \$19.58/hour (2018) to \$20.03/hour (2019)
- Increase migration of people into the area and decrease the migration out of the area;
- Ensure that new job creation averages an hourly rate of at least \$20 per hour;
2018-2019 total of \$50,081,096 in new payroll annually with an average wage of \$21.27
- Increase local business diversity by tallying new or expanding business projects in at least ten (10) different NAICS categories;
2018-2019 Annual submissions for projects representing 40 different NAICS categories
- Perform 225 existing business calls and affect the retention of 350 jobs per year with existing employers;
- Secure annual commitments of \$45 million in new taxable capital;
In 2019-2020, \$234,405,286 in new taxable capital achieved
- Close on four new small business loans each year through the Horseshoe Revolving Loan Fund and other capital start-up or growth sources;
Six new loans closed from 6/1/19—12/31/19 totaling \$290,000 loaned
- Maintain MMA membership participation rate of 85%.

Serving our Members through Business Resource Services and Programming

Existing businesses create a stable environment by providing jobs for area residents, opportunities for local business-to-business commerce, consumer goods and services, and support of community activities. Notwithstanding these community benefits, local businesses drive wealth creation for the owners and employees. For these many reasons, the business resource team at 1si comprises much of the organization's visible work.

Business resource services at 1si include our education, networking, advertising and promotional activities. The purpose of these activities is to attain, retain and engage members in 1si to help empower our local businesses.

Key Elements of our Work in this Area

- Hosting events and programs directed to maximize benefit to our members
- Educating members as to what 1si does to increase the value of their membership;
- Targeting communication of events to maximize networking and educational impact;
- Maintaining and increasing performance metrics for our events and programs to show benefit to our organization, our members and our sponsors; and
- Promoting our member businesses.

Impact of Horizon Influencers

- To ensure member participation in our organization, 1si must:
- Recognize that each member chooses to be a member and doesn't view membership as an obligation;
- Give them network opportunities with a theme or purpose;
- Offer options with their membership – find ways to add ala carte benefits;
- Create greater efficiencies in communications through technology;
- Help business leaders cope with the local impacts of global policies;
- Encourage business leaders to engage their next generation of leaders in 1si; and
- Create more targeted groups that fit the regional demographics and focus on topics with universal acceptance.

What you will Observe from 1si

- Providing core business services programming that transcends industry sectors;
- Developing timely educational forums to help business owners make informed business decisions;
- Identifying, implementing and maximizing affinity programs;
- Strengthening business resource services by exploring regional partnership opportunities with regional benefits;
- Establishing direction and results mechanisms to enhance the experiences for volunteer committees, including the 1si Ambassadors;
- Enhancing membership services to maximize value received at different levels within the tiered membership structure;
- Maximizing the value of events as measured from the member point-of-view;
- Cultivating small businesses by showing 1si value adds to their bottom lines;
- Targeting business resource services to business owners who are young or minority; and
- Working with partner merchant associations to strengthen business-to-consumer connections.

Communicating and Branding our Work

- Establishing and improving upon the value proposition that 1si offers our members;
- Distinguishing our brand recognition throughout the region;
- Enhancing communications methods to inform members of services and upcoming events;
- Maximizing social media strategies for member engagement;
- Acquiring and applying member feedback for continuous improvement; and
- Benchmarking 1si's offerings and results with similar organizations, both regionally and nationally.

How we Measure Success

- Maintain the annual membership retention rate at or above the national average reported by peer organizations;
In spite of the COVID-19 outbreak, 1si membership retention levels remain relatively steady
 - * Feb 91.04%
 - * Mar 90.94%
 - * Apr 90.66%
 - * May 87.92%**New member revenue up 22% in first two quarters 2019-2020.**
- Track and report that 90% of members participate in 1si activities each year;
- Improve the member feedback system for each event, and achieve satisfactory or higher results from participants;
Surveys sent for all signature events, 75% of other events and ribbon cuttings; results consistently in the 75%–100% satisfaction range.
- Similarly, improve the sponsor feedback system for each event, and achieve satisfactory or higher results from sponsors;
Sponsor surveys sent for all signature events, 75% of other events and ribbon cuttings; results consistently in the 87%–100% satisfaction range.
- Increase potential member prospect activity within existing services offered by 1si.

Providing Catalytic Leadership

The role of 1si in promoting a fiscally-stable, business-friendly environment transcends local, regional, state and national issues. Our members and investors support our leadership as a change agent to further our organizational mission. Through our leadership and advocacy initiatives, we promote positive change by serving as the "Champions of Ideas" to achieve economic and business vitality for the region. Additionally, we strive to provide for our investors and members access to policy makers through forums, roundtables and one-on-one meetings.

Key Elements of our Work in this Area

- Opportunities and access for members and investors to discuss business and leadership issues with their elected officials in local, state and federal positions;
- Development of an annual advocacy agenda that hits key visionary, long-term strategies;
- Enhanced collaborations with regional, state and national partners on issues important to 1si members and investors;
- Partnering with governmental officials to implement projects that add to the "Quality of Place" and enhance our business environment; and
- Establish and build upon our role as a change agent with state and federal agencies and officials.

Impact of Horizon Influencers

- To serve our business community through catalytic leadership, 1si must:
- Identify local independent voices on issues and convene them together around the topics of interest;
- Get out in front of issues by proactively identifying those who are passionate to help;
- Develop faster mechanisms for faster decision making;
- Access information and analytics before taking positions and influencing decisions;
- Encourage public policy to arise through business leaders instead of government; and
- Institute rapid response for negotiations and conflict resolution.

What you will Observe from 1si

- Enhancing relationships with local government to ease the path for business vibrancy;
- Establishing dialogue with local policy makers to advance two-way communication on issues;
- Creating regional advocacy alliances to strengthen Southern Indiana's voice with state policy makers;
- Facilitating discussions with elected officials, business leaders and the public about key policy issues and strategic objectives;
- Adopting an annual Advocacy Agenda as negotiated by the Advocacy Council;
- Recognizing that the positions taken are not based upon popularity, and stand firm towards desired results; and
- Partnering with other local, state and regional organizations on common policy positions.
- Communicating and Branding our Work
- Brand 1si as a convener and facilitator between businesses with city, county and state governments;
- Distribute a position statement and follow-up report on each idea 1si champions;
- Publicize 1si's Advocacy Agenda each year;
- Initiate crises intervention action plans for immediate response to negative coverage; and
- Demonstrate relevance as an "expert" with local, regional and state media sources.

How we Measure Success

- Facilitate and assist in one significant community or infrastructure project each year;
Served as the Administrative arm of the Our SoIN RDA
- Host at least four advocacy events each year to give members and investors access to elected and appointed officials;
Hosted Senator Mike Braun for a Lunch and Learn
Hosted Senator Todd Young for a Zoom Meeting with Members
Hosted annual Meet your Local Officials 5 O'clock Network
Hosted Mayor Jeff Gahan for a Zoom Meeting with Members
- Conduct at least one educational advocacy event each year for members and investors;
Hosted Indiana Chamber of Commerce Legislative Preview Luncheon with Vice President Bill Waltz
- Host at least one business roundtable event on advocacy positions each year.

Matt Hall, Executive Vice President, named to the 2020 list of North America's Top 50 Economic Developers by Consultant Connect.

Wendy Dant Chesser, President and CEP named:

- **Recipient of the IU Southeast 2019 Chancellor's Medallion**
- **Louisville Business First 2020 Enterprising Woman**
- **IEDA Chair 2020; Named Economic Development Professional of the Next Half-Century in 2018.**

Collaboration for Regional Prosperity

Collaboratively solving problems of the region enhances the overall attractiveness of our communities, which in turn enhances our economic growth competitiveness. Building this type of culture in Southern Indiana will allow residents from all socio-economic demographics to participate and prosper in our regional economy. 1si will coordinate, facilitate and engage in strategic initiatives to maximize transformative activities throughout the region. We will be responsive to issues that have the potential for positively impacting the Southern Indiana region and our neighboring communities.

Key Elements of our Work in this Area

- Enhancing the initiatives of the Our Southern Indiana Regional Development Authority and other regional planning organizations;
- Convening business leadership and involvement with K-12 educational institutions and the State of Indiana's Pathway graduation criteria;
- Promoting social entrepreneurship by using business concepts and principles to bring about positive change to community concerns; and
- Facilitating government partnerships to maximize consistency and effectiveness of local economic development tools.

Impact of Horizon Influencers

- To increase our regional prosperity, 1si must:
 - * Recognize that the economic vibrancy of our region transcends geographical and political boundaries;
 - * Understand that greater transparency of decisions leads to accountability and eliminates civic dysfunction;
 - * Distinguish between real needs and perceived needs;
 - * Promote that true collaboration is built on trust and respect;
 - * Preach that Southern Indiana is stronger and more competitive as a region than as a set of individual communities; and
 - * Show unengaged members of our community a message that attracts and includes them.

What you will Observe from 1si

- Continuing regular dialogue opportunities for our elected officials;
- Supporting business engagement with the Academies of Greater Clark in conjunction with the Ford Next Generation Learning initiative;
- Promoting "quality of place" partnerships to enhance the livability in Southern Indiana;
- Collaborating with local governments on areas of concern to our business members;
- Improving regional infrastructure to better serve residents and businesses;
- Complimenting the regional activities of Align Southern Indiana and other non-profits; and
- Engaging with policy makers to enhance our regional location advantages.

Communicating and Branding our Work

- Create communications guidelines with partners early in collaborative processes;
- Convene stakeholders in planning stages of applicable 1si projects and initiatives;
- Celebrate milestone accomplishments with collaborative partners;
- Promote partnerships that contribute to successful initiatives; and
- Document processes where multiple partners are engaged.

How we Measure Success

- Increase the number of strategic partners with whom 1si engages on strategic work;
- Engage in community dialogues with education partners and business leaders to discuss workforce needs;
Participate with Ford Next Gen Learning Initiative, Academies of Great Clark, Ivy Tech Community College Board,
- Assert 1si's voice in statewide policy discussions on economic development and other policy-level discussions each year through partner and membership organizations;
Bi-state effort with five regional partners advocated Nurse License Compact passes with Wendy testifying twice
- Ensure millennials are included in collaborative work;
YP-1si is formed with quarterly events on the work of 1si including economic development
- Engage organizational leadership in community benchmarking exercise each year;
- Participate in at least three pivotal meetings or events each year on collaborative projects.
Matt Hall and Suzanne Ruark serve on the Bi-State Sherman Minton Renewal Project Advisory Board

Organizational Sustainability

In order to lead our community through our big-picture goals and objectives, 1si performs many day-to-day activities to ensure the effective and efficient operation of our organization to serve our business members and investors, as well as the communities in which we operate. The longevity and ultimate effectiveness of these service activities depends upon successful administrative and fiscal accountabilities.

Key Elements of our Work in this Area

- Governing to maximize engagement of various board members, staff, investors, members and other stakeholders in securing investors and members;
- Providing financial oversight of all operations of the organization and our related entities;
- Promoting staff and volunteer development activities;
- Goal-oriented fundraising efforts as spear-headed by our Investor Relations Committee;
- Exploring opportunities and implementing strategies toward organizational sustainability; and
- Holding the Board of Directors and staff to financial accountability for all activities.

Impact of Horizon Influencers

- To ensure integrity in our financial and governance processes, 1si must:
 - Monetize value propositions for services and activities to show a return on investment to members and the organization;
 - Allow members to choose add-on services for which they are willing to pay;
 - Build our financial future around serving the next generation of business leaders;
 - Invest in technologies that enhance the member experience; and
 - Align resources with the needs identified by members.

What you will Observe from 1si

- Good stewardship of resources that are entrusted to us, and annual audits authenticating our successful administration of these funds;
- Continued financial sustainability through increased membership, additional investors and non-dues revenue sources;
- Annual budgets that depend upon return on investment of our activities in addition to fundraising;
- Expansion of the number of investors and members in our organization, with special attention to those companies that have benefited from our economic development services;
- Continued emphasis on staff development, both as individuals and as a team;
- Successful pass-through programs operating zero-balance budgets;
- Organizational governance that is not only responsive to our members and investors, but also efficient and strategic;
- Maximizing the OSI Foundation's role in funding economic development priorities;
- Benchmarking against similar organizations on financial support and member engagement; and
- Exploring the acquisition of appreciating assets for 1si.

Communicating and Branding our Work

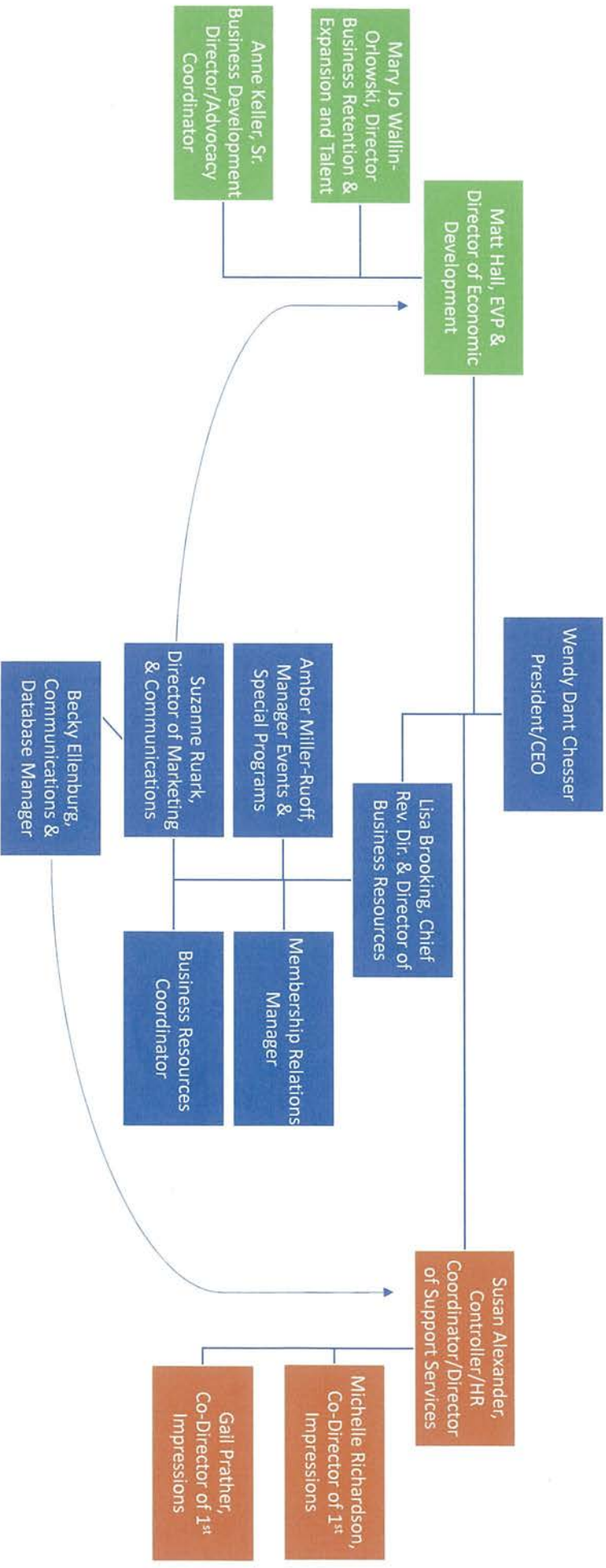
- Improved communication and meaningful relationship management with our financial contributors;
- Develop and market a value proposition to identify financial worth and relevance
- Creative engagement for business and community leaders in providing subtle guidance, persuasiveness, influence, and maximizing synergies from our partnerships;
- Report the reviews of 1si's membership dues and investor tiered structures; and
- Thorough communications with the Board of Directors and Executive Committee so that volunteer members are engaged in effective meetings and decision-making processes.

How we Measure Success

- Develop annual budgets that direct activities in accordance with strategic priorities;
Completed FYE June 30, 2019
- Enhance financial dashboard to chart financial progress month-to-month;
- Develop and promote annual fundraising goals that increase revenues by at least 3% per year;
On target for 2019-2020 Fiscal Year (Pre-COVID 19)
- Proactive forecasting of accounts receivable/accounts payable and trending of economic status;
- Increase percentage of public funding/fee-for-service to meet national averages for similar organizations; and
- Conduct staff performance reviews annually, to include individual development plans.
Completed for FYE June 30, 2019



1si Organization Chart



Updated January 1, 2020

How has your chamber demonstrated leadership in your community?

The recent leadership accomplishments of One Southern Indiana (1si) can best be defined by our work in two categories: regional development activities and our COVID-19 response.

Regionally, 1si assumes the leadership role for Clark and Floyd counties by several activities:

- **Our Southern Indiana Regional Development Authority.** 1si lead effort to form an RDA in 2017 and has since served as administrator for the unstaffed group. Since 7-1-19, we have achieved monumental success in an area not known for its regional cooperation. A regional development plan encompassing five counties (Clark, Floyd, Jefferson, Scott and Washington) was completed in August and submitted to the Indiana Economic Development Corporation to fulfill a planning grant. The Board of the IEDC approved this plan in December and 1si led the regional celebration of this milestone achievement.
- **Regional Economic Development.** 1si participates in many regional activities aimed at creating economic success for all. We have a unique partnership with our neighbors to the south in the Louisville (KY) metropolitan area. Our commitment to regional growth is evident by our work with the metro area's planning for economic prosperity. 1si was integral in identifying regional strengths, needs and strategies, as well as ensuring our local communities can be good stewards of taxpayer dollars by minimizing those stagnant companies that press for economic incentives with both states by "river hopping" – resulting in a zero net gain for regional growth.
- **Regional Marketing.** 1si has played a vital role in marketing Southern Indiana assets by coordinating a regional working group to research and fund a marketing initiative highlighting our most attractive infrastructure assets for growth: roads, rail, runways and river. Known as "The Fouridor," this website is managed by 1si for the betterment of the entire region and can be viewed at www.thefouridor.com.

But perhaps our most significant leadership activities have been those in response to the COVID-19 crisis. In early March, 1si was able to pivot our efforts to prepare businesses as best we could for the impending crisis. We rolled out the **1si Cares!** Program on March 17th. Since that time, *1si has averaged 1,500 engagements weekly on our main platform, social media.* The program consists of three components:

- **1si Connects:** 1si used our website in an online effort to pair businesses with services available and those with needs related to the pandemic.
- **1si Calls:** 1si Facebook Live events, Zoom webinars and virtual chats to cover a variety of topics in an interactive way so members and non-members can "Ask the Expert" questions in their fields or to access information from officials. Since the launch of this program in late March, *1si posted videos have been viewed approximately 15,800 times.*
- **1si Collaborates:** Cash flow is still the biggest need of small businesses. 1si coordinated with many local and regional partners to commit over \$1.2 million from private donors, foundations, and local government for small business relief. Three separate loan products were created, and while not all lending is completed, this program has *loaned \$1,153 in forgivable and zero-interest loans to 123 small businesses* in Clark and Floyd counties. Starting with the infrastructure of the 1si-administered Caesar's Revolving Loan Fund, 1si stepped up to manage the entire program in house.

In addition, 1si immediately reached out to elected officials and representatives of state agencies to provide our members with an opportunity to have their concerns and questions answered. Governor Holcomb's Stay at Home Order was issued on March 24th. Within two weeks, 1si had featured online events with audience Q&A with Southeast ISBDC Executive Director Kari Johnson, Executive Director of the Region 10 Workforce Board-WorkOne Southern Indiana Tony Waterson and U.S. Senator Todd Young. These three events alone have had more than 1,000 views. In addition, President and CEO Wendy Dant Chesser and Executive Vice President Matt Hall have both held a Facebook Live event and the two videos have been viewed more than 900 times.

What efforts has the chamber undertaken to enhance the level of business activity or commerce in your chamber service area?

One Southern Indiana (1si) is enhancing the level of business activity for our community in several ways. As the premier economic development organization for Southern Indiana, our mission is simple – to help businesses thrive in the Southern Indiana and metro area. Our motto is even simpler – we grow business. And we live both of these every day.

We understand the importance of achieving our mission. As the lead economic development organization for Clark and Floyd counties, we share responsibility for economic growth to enhance opportunities for our residents. We measure our efforts in new business attraction, existing business expansion and retention, and business development by creating goals and metrics around new jobs created, existing jobs retained, and tax base investment committed.

However, our most important metric for measuring economic success is marking an increase in our county average wages. At 1si, we believe that *the best social program in the world is a good-paying job*. Our job is to not only attract jobs that pay more than average, but also to ensure our workforce has the skills to earn higher wages.

Through our WorkHub initiative, we are working to develop tangible programs centered around needs of the job provider. We strive to be the voice of the demand side – or employer side – of the supply-demand equation.

But we know we must serve existing businesses first. These businesses – both large and small – create a stable environment by providing jobs for area residents, opportunities for local business-to-business commerce, consumer goods and services, and support of and engagement in community activities. Notwithstanding these community benefits, local businesses drive wealth creation for both owners and employees.

For these many reasons, the business resource team at 1si comprises much of the organization’s visible work. Business resource services at 1si include our education, networking, advertising and promotional activities. The purpose of these activities is to attain, retain and engage members in 1si to help empower our local businesses.

Our FY 2019-20 (starting July 1) looked promising in that we expected to continue building upon several years of economic growth. In the first six months of the FY, we were well underway to our goals, tracking:

Economic Development:	Business Resource Services:
<ul style="list-style-type: none">• 80% towards our goal of \$50 million in capital investment• 584 jobs created, surpassing goal of 400• New job wages of \$32.26 per hour – well above goal of \$21 per hour for new jobs• 50% of goal for Existing Business Calls at 108• Tracking of 15+ NAICS codes for diversification• Closed 6 revolving fund loans to small businesses• Secured seven new sponsors for our Manufacturing event, exceeding budget by \$5,500	<ul style="list-style-type: none">• 54% to goal by hosting 27 Ribbon Cutting events• Redefined Business Expo as B-to-B event• Relaunch of Insurance Under One program providing health plans for members• YP1si mentorship program launched• Leadership from Within training for those companies promoting existing workers• New Member revenue goals exceeded budget by nearly 27%• Reformatted roundtable group to better serve members needs

Our membership levels were consistent, the investors supporting our organization were committed to our cause and we expected to hit our stretch goals in all categories. And for the eight months, we were on track. Then came COVID-19 . . . and while our world turned upside down, our resolve does not.

ONE SOUTHERN INDIANA
ORGANIZATIONAL SUMMARY
BUDGET FY 2019 2020

INCOME SUMMARY STATEMENT														FY 2019/20	FY 2018/2019
	Jul-19	Aug-19	Sept-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Apr-20	May-20	June-20	YTD	Full-Year	
	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Proposed	Budget	
REVENUES SUMMARY															
1	Member & Investor	110,174.39	99,514.42	67,768.21	102,231.78	48,209.47	245,032.95	116,805.05	100,465.29	81,034.38	78,784.18	69,284.18	1,222,859.48	1,236,794.79	
2	Business Resource	6,344.78	41,486.82	47,755.15	9,814.44	28,331.13	13,000.22	11,383.33	11,055.07	15,793.85	48,613.33	29,533.33	329,519.82	349,180.00	
3	Community Messaging	750.00	750.00	1,000.00	1,750.00	750.00	1,000.00	1,750.00	750.00	1,000.00	750.00	16,250.00	27,500.00	23,000.00	
4	Collaborative Partnerships	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
5	Advocacy	0.00	0.00	1,350.00	0.00	2,500.00	0.00	1,300.00	0.00	1,550.00	0.00	0.00	6,700.00	4,650.00	
TOTAL REVENUES		117,269.17	141,751.24	117,873.36	113,796.22	79,790.60	259,033.17	131,238.38	112,270.36	99,378.23	128,147.51	115,067.51	1,586,579.30	1,613,624.79	
EXPENSES SUMMARY															
6	General & Administrative	52,061.43	47,980.47	49,044.07	57,274.07	50,940.90	46,695.97	43,883.26	46,769.82	48,919.80	47,497.45	46,631.26	73,087.77	610,786.31	561,821.60
7	Economic Development	30,499.20	34,414.87	31,663.87	38,475.87	31,160.29	30,794.03	30,646.19	38,481.67	30,018.08	32,536.26	38,791.26	41,090.26	408,571.89	521,140.95
8	Business Resource	18,224.64	48,379.43	37,994.81	17,102.59	33,160.13	19,570.47	17,841.20	17,255.01	19,321.84	46,441.07	31,924.28	47,333.37	354,548.83	335,480.92
9	Community Messaging	18,555.17	13,785.17	15,320.17	13,385.17	13,410.17	14,355.17	13,335.17	14,435.17	30,965.17	22,375.17	15,485.17	15,408.17	200,814.99	189,115.05
10	Collaborative Partnerships	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
11	Advocacy	25.00	0.00	3,020.00	0.00	1,050.00	0.00	445.00	50.00	1,045.00	50.00	0.00	25.00	5,710.00	3,785.00
TOTAL EXPENSES		119,365.44	144,559.94	137,042.92	126,237.70	129,721.49	111,415.64	106,150.82	116,991.67	130,269.89	148,899.95	132,831.97	176,944.57	1,580,432.02	1,611,343.52
NET INCOME		-2,096.27	-2,808.70	-19,169.56	-12,441.48	-49,930.89	147,617.53	25,087.56	-4,721.31	-30,891.66	-20,752.44	-17,764.46	-5,981.06	6,147.28	2,281.27
														FY 2019/20	FY 2018/2019
														YTD	Full-Year
														Proposed	Budget
NET INCOME SUMMARY															
1	Member & Investor Revenue	110,174.39	99,514.42	67,768.21	102,231.78	48,209.47	245,032.95	116,805.05	100,465.29	81,034.38	78,784.18	69,284.18	1,222,859.48	1,236,794.79	
6	General & Administrative Expense	52,061.43	47,980.47	49,044.07	57,274.07	50,940.90	46,695.97	43,883.26	46,769.82	48,919.80	47,497.45	46,631.26	73,087.77	610,786.31	561,821.60
7	Economic Development Expense	30,499.20	34,414.87	31,663.87	38,475.87	31,160.29	30,794.03	30,646.19	38,481.67	30,018.08	32,536.26	38,791.26	41,090.26	408,571.89	521,140.95
Net Income Organizational Sustainability		27,613.75	17,119.07	-12,939.74	6,481.83	-33,891.73	167,542.94	42,275.59	15,213.79	2,096.49	-1,249.54	-16,138.35	-10,622.86	203,501.28	153,832.24
2	Business Resource Revenue	6,344.78	41,486.82	47,755.15	9,814.44	28,331.13	13,000.22	11,383.33	11,055.07	15,793.85	48,613.33	29,533.33	329,519.82	349,180.00	
8	Business Resource Expense	18,224.64	48,379.43	37,994.81	17,102.59	33,160.13	19,570.47	17,841.20	17,255.01	19,321.84	46,441.07	31,924.28	47,333.37	354,548.83	335,480.92
Net Income Business Resources		-11,879.86	-6,892.61	9,760.34	-7,288.15	-4,829.00	-6,570.25	-6,457.87	-6,199.94	-3,527.99	2,172.26	-2,390.95	19,074.96	-25,029.01	13,699.08
3	Community Messaging Revenue	750.00	750.00	1,000.00	1,750.00	750.00	1,000.00	1,750.00	750.00	1,000.00	750.00	16,250.00	27,500.00	23,000.00	
9	Community Messaging Expense	18,555.17	13,785.17	15,320.17	13,385.17	13,410.17	14,355.17	13,335.17	14,435.17	30,965.17	22,375.17	15,485.17	15,408.17	200,814.99	189,115.05
Net Income Community Messaging		-17,805.17	-13,035.17	-14,320.17	-11,635.17	-12,660.17	-13,355.17	-11,585.17	-13,685.17	-29,965.17	-21,625.17	764.83	-14,408.17	-173,314.99	-166,115.05
4	Collaborative Partnerships Revenue	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
10	Collaborative Partnerships Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Net Income Collaborative Partnerships		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
5	Advocacy Revenue	0.00	0.00	1,350.00	0.00	2,500.00	0.00	1,300.00	0.00	1,550.00	0.00	0.00	6,700.00	4,650.00	
11	Advocacy Expense	25.00	0.00	3,020.00	0.00	1,050.00	0.00	445.00	50.00	1,045.00	50.00	0.00	25.00	5,710.00	3,785.00
Net Income Advocacy		-25.00	0.00	-1,670.00	0.00	1,450.00	0.00	855.00	-50.00	505.00	-50.00	0.00	-25.00	990.00	865.00
NET INCOME SUMMARY		-2,096.27	-2,808.70	-19,169.56	-12,441.48	-49,930.89	147,617.53	25,087.56	-4,721.31	-30,891.66	-20,752.44	-17,764.46	-5,981.06	6,147.28	2,281.27

ONE SOUTHERN INDIANA
ORGANIZATIONAL SUSTAINABILITY
BUDGET FY 2019 2020

MEMBER & INVESTOR REVENUES	Jul-19 Budget	Aug-19 Budget	Sept-19 Budget	Oct-19 Budget	Nov-19 Budget	Dec-19 Budget	Jan-20 Budget	Feb-20 Budget	Mar-20 Budget	Apr-20 Budget	May-20 Budget	June-20 Budget	YTD Budget	FY 2019/20	FY 2018/19
REVENUES															
4000 · Current Dues	34,775.84	34,775.84	34,775.84	34,775.84	34,775.84	34,775.84	34,775.84	34,775.84	34,775.84	34,775.84	34,775.84	34,775.84	34,775.84	417,310.08	393,000.00
4061 · Publications	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	300.00	900.00
4150 · Investor Support	61,983.34	55,973.34	24,333.34	43,538.34	3,523.34	74,123.34	71,633.34	57,000.00	36,125.01	30,333.34	25,833.34	59,165.34	543,565.41	440,772.36	440,772.36
4180 · Interest	65.21	65.24	59.03	67.60	60.29	83.77	95.87	89.45	83.53	75.00	75.00	75.00	894.99	894.99	250.00
4190 · Miscellaneous	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	739.00	7,339.00	7,339.00	7,339.00
TOTAL REVENUES	97,424.39	91,414.42	59,768.21	78,981.78	38,959.47	109,582.95	107,105.05	92,465.29	71,584.38	65,784.18	61,284.18	95,055.18	969,409.48	61,284.18	842,261.36
GENERAL & ADMIN EXPENSES															
5005 · Salaries & Wages	27,787.98	27,787.98	27,787.98	27,787.98	27,787.98	27,787.98	24,541.48	26,798.81	26,798.81	26,798.81	26,798.81	26,798.81	26,798.81	325,263.41	309,875.44
5015 · Retirement	1,703.28	1,703.28	1,703.28	1,703.28	1,703.28	1,703.28	1,508.49	1,508.49	1,508.49	1,508.49	1,508.49	1,508.49	1,508.49	19,270.62	19,624.53
5025 · Employee Benefits	1,446.81	1,446.81	1,446.81	1,446.81	1,446.81	1,446.81	1,395.50	1,395.50	1,395.50	1,395.50	1,395.50	1,395.50	1,395.50	17,053.86	20,277.24
5035 · Taxes - Payroll	1,997.05	1,997.05	1,997.05	1,997.05	1,997.05	1,997.05	1,738.63	1,738.63	1,738.63	1,738.63	1,738.63	1,738.63	1,738.63	22,414.08	21,465.46
5105 · Building Lease	6,166.00	6,166.00	6,166.00	6,166.00	6,166.00	6,166.00	6,166.00	6,166.00	6,166.00	6,166.00	6,166.00	6,174.00	74,000.00	74,000.00	74,000.00
5106 · Insurance															
5106.01 · Building Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,000.00	2,000.00
5106.02 · Cyber Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	1,000.00
*5115 · Copier	695.76	695.76	695.76	695.76	695.76	695.76	695.76	995.76	695.76	695.76	695.76	695.76	695.76	8,949.12	8,544.60
5120 · Credit Card Fees	325.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00	3,900.00	4,500.00
5121 · Miscellaneous	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	600.00	600.00
5125 · Dues & Subscriptions	1,445.00	950.00	600.00	400.00	240.00	300.00	460.00	355.00	1,200.00	425.00	50.00	1,000.00	7,425.00	7,100.00	7,100.00
*5130 · Equip/Rental/Lease	155.00	275.00	155.00	155.00	155.00	155.00	155.00	155.00	155.00	155.00	155.00	155.00	1,980.00	1,740.07	1,740.07
5135 · Board of Directors															
5135.01 · General	127.54	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	811.68	85.00	520.00	1,644.22	1,800.00	1,800.00
5135.02 · D&O Insurance	0.00	0.00	0.00	0.00	4,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4,000.00	4,000.00
5145 · Mileage	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	960.00	2,000.00
*5150 · Telephone	660.00	660.00	660.00	660.00	660.00	660.00	660.00	660.00	660.00	660.00	660.00	660.00	660.00	7,920.00	7,920.00
5155 · Postage	140.00	140.00	140.00	140.00	140.00	140.00	140.00	140.00	140.00	140.00	140.00	160.00	1,700.00	1,700.00	1,700.00
*5160 · Printing	0.00	160.00	160.00	0.00	160.00	0.00	0.00	260.00	750.00	0.00	0.00	1,055.00	2,545.00	4,000.00	4,000.00
5165 · Professional & Legal Fees	1,200.00	0.00	0.00	9,500.00	0.00	0.00	1,350.00	0.00	0.00	0.00	950.00	2,000.00	15,000.00	15,000.00	15,000.00
5170 · Professional Development	850.00	0.00	2,550.00	0.00	200.00	0.00	0.00	200.00	0.00	1,500.00	700.00	500.00	6,500.00	6,500.00	6,500.00
5175 · Supplies	350.00	1,400.00	100.00	250.00	1,000.00	1,200.00	555.00	1,200.00	245.00	700.00	700.00	700.00	8,400.00	8,433.26	8,433.26
5180 · Staff Support	30.00	175.00	130.00	1,175.00	225.00	100.00	35.00	70.00	60.00	180.00	180.00	0.00	2,360.00	1,280.00	1,280.00
*5185 · Tech Support & Software	4,531.58	1,651.16	1,660.16	2,128.16	1,700.69	1,680.76	1,743.07	1,993.70	1,719.48	1,894.25	1,969.74	2,288.25	24,951.00	22,611.00	22,611.00
*5235 · Auto Allowance	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	7,200.00	7,200.00	7,200.00
5345 · Travel/Mtgs/Meals	112.10	9.10	428.70	105.70	0.00	0.00	76.00	469.60	23.80	75.00	75.00	75.00	1,450.00	1,450.00	1,450.00
6000 · Depr and Amort - Allowable & Bad Debt	1,608.33	1,608.33	1,608.33	1,608.33	1,608.33	1,608.33	1,608.33	1,608.33	1,608.33	1,608.33	1,608.33	1,608.33	19,300.00	7,200.00	7,200.00
6000 · Allowance for Doubtful	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	23,000.00	0.00	0.00
TOTAL EXPENSES	52,061.43	47,980.47	49,044.07	57,274.07	50,940.90	46,695.97	43,883.26	46,769.82	48,919.80	47,497.45	46,631.26	73,087.77	610,786.31	561,821.60	561,821.60
NET INCOME	45,362.96	43,433.95	10,724.14	21,707.71	-11,981.43	62,886.98	63,221.79	45,695.47	22,664.58	18,286.73	14,652.92	21,967.41	358,623.17	280,439.76	280,439.76

ONE SOUTHERN INDIANA
ECONOMIC DEVELOPMENT
BUDGET FY 2019 2020

ECONOMIC DEVELOPMENT (includes Workhub)												FY 2018/19		
	Jul-19 Budget	Aug-19 Budget	Sept-19 Budget	Oct-19 Budget	Nov-19 Budget	Dec-19 Budget	Jan-20 Budget	Feb-20 Budget	Mar-20 Budget	Apr-20 Budget	May-20 Budget	June-20 Budget	FY 2019/20 YTD Budget	Full-Year Budget
REVENUES														
4168 - Workhub	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	136,217.43
4170 - ED Grants -OSI Fo. & HoosierEnergy Grants	0.00	0.00	0.00	0.00	1,250.00	120,000.00	0.00	0.00	1,250.00	0.00	0.00	0.00	122,500.00	95,950.00
4005 - MMA Member Dues	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00	96,000.00	96,000.00
4006 - Revolving Loan Fund	0.00	100.00	0.00	5,000.00	0.00	0.00	200.00	0.00	200.00	5,000.00	0.00	0.00	10,500.00	10,700.00
4300 - Program & Project Revenue														
4310 - Sponsorship	4,750.00	0.00	0.00	10,250.00	0.00	7,450.00	1,500.00	0.00	0.00	0.00	0.00	500.00	24,450.00	37,666.00
4320 - Registration	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18,000.00
4330 - Miscellaneous/MMA ENewsletter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL REVENUES	12,750.00	8,100.00	8,000.00	23,250.00	9,250.00	135,450.00	9,700.00	8,000.00	9,450.00	13,000.00	8,000.00	8,500.00	253,450.00	394,533.43
EXPENSES														
5005 - Salaries & Wages	23,053.60	23,053.60	23,053.60	23,053.60	23,053.60	23,053.60	23,053.60	23,053.60	23,053.60	23,053.60	23,053.60	23,053.60	276,643.22	344,004.72
5015 - Retirement	1,383.22	1,383.22	1,383.22	1,383.22	1,383.22	1,383.22	1,383.22	1,383.22	1,383.22	1,383.22	1,383.22	1,383.22	16,596.59	20,640.28
5025 - Employee Benefits	1,712.73	1,712.73	1,712.73	1,712.73	1,712.73	1,712.73	1,712.73	1,712.73	1,712.73	1,712.73	1,712.73	1,712.73	20,552.80	20,916.72
5035 - Taxes & Payroll	1,866.71	1,866.71	1,866.71	1,866.71	1,866.71	1,866.71	1,866.71	1,866.71	1,866.71	1,866.71	1,866.71	1,866.71	22,400.55	28,159.23
5125 - Dues & Subscriptions	980.28	866.46	467.76	63.57	825.00	0.00	66.33	1,000.00	665.28	530.00	300.00	453.00	6,217.68	6,000.00
5145 - Mileage	435.57	282.58	452.17	292.12	317.70	342.43	515.16	257.02	131.88	540.00	500.00	461.00	4,527.63	9,900.00
5150 - Telephone	212.87	212.75	212.75	212.75	178.33	175.13	150.00	350.27	225.14	225.00	225.00	450.00	2,829.99	4,620.00
5160 - Printing	0.00	0.00	159.00	0.00	0.00	159.00	0.00	0.00	159.00	0.00	0.00	0.00	477.00	339.00
5170 - Professional Development	0.00	251.46	1,000.00	3,869.91	600.00	0.00	613.99	529.16	78.40	0.00	1,000.00	0.00	7,942.92	11,100.00
0000 - Horseshoe Revolving Loan Fund	0.00	600.00	600.00	0.00	0.00	900.00	0.00	1,080.00	0.00	1,400.00	0.00	1,100.00	5,680.00	7,700.00
5305 - Bus Retention & Expansion (BRE)	100.00	100.00	100.00	100.00	0.00	100.00	100.00	100.00	100.00	100.00	100.00	0.00	1,000.00	1,000.00
5315 - Investor Relations	300.00	375.00	125.00	300.00	160.00	700.00	1,000.00	450.00	150.00	325.00	400.00	825.00	5,110.00	4,280.00
5320 - Lead Generation Consultants	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	600.00	1,000.00	1,600.00	2,375.00
5325 - Outreach	251.98	0.00	65.63	0.00	0.00	0.00	2.95	6,440.00	0.00	0.00	2,650.00	1,600.00	11,070.56	11,500.00
5330 - Prospect Development	0.00	45.15	0.00	330.00	1,000.00	0.00	154.85	100.00	0.00	700.00	600.00	1,500.00	4,430.00	6,000.00
5345 - Travel/Mtgs/Meals - Domestic	202.24	165.21	105.30	1,261.26	63.00	176.21	26.65	158.96	492.12	700.00	900.00	400.00	4,650.95	4,770.00
5346 - Travel/Mtgs/Meals - International	0.00	3,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,500.00	0.00	7,000.00	10,000.00
7300 - Program Expense														
7301 - Supplies	0.00	0.00	0.00	1,680.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,735.00	5,415.00	6,350.00
7305 - Marketing	0.00	0.00	360.00	950.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,310.00	1,370.00
7310 - Food & Beverage	0.00	0.00	0.00	1,100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,550.00	2,650.00	7,416.00
7315 - Postage	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7320 - Printing	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7325 - Facility/Booth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7330 - Speaker/Presenter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,910.00
7390 - Miscellaneous	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7,200.00
7395 - Credit Card Processing Fees	0.00	0.00	0.00	300.00	0.00	225.00	0.00	0.00	0.00	0.00	0.00	0.00	525.00	115.00
TOTAL EXPENSES	30,499.20	34,414.87	31,663.87	38,475.87	31,160.29	30,794.03	30,646.19	38,481.67	30,018.08	32,536.26	38,791.26	41,090.26	408,571.89	521,140.95
NET INCOME	-17,749.20	-26,314.87	-23,663.87	-15,225.87	-21,910.29	104,655.97	-20,946.19	-30,481.67	-20,568.08	-19,536.26	-30,791.26	-32,590.26	-155,121.89	-126,607.52

ONE SOUTHERN INDIANA
BUSINESS RESOURCES
BUDGET FY 2019 2020

BUSINESS RESOURCES	Jul-19 Budget	Aug-19 Budget	Sept-19 Budget	Oct-19 Budget	Nov-19 Budget	Dec-19 Budget	Jan-20 Budget	Feb-20 Budget	Mar-20 Budget	Apr-20 Budget	May-20 Budget	June-20 Budget	YTD Budget	FY 2019/20	FY 2018/19
REVENUES															
4010 · New Member Dues	5,833.33	5,833.33	5,833.33	5,833.33	5,833.33	5,833.33	5,833.33	5,833.33	5,833.33	5,833.33	5,833.33	5,833.33	70,000.00	70,000.00	70,000.00
4330 · Affinity Income	11.45	853.49	11.82	931.11	1,337.80	16.89	0.00	1,671.74	10.52	0.00	0.00	1,700.00	6,544.82	10,000.00	10,000.00
4300 · Program & Project Revenue															
*4310 · Sponsorship	500.00	20,000.00	22,050.00	500.00	14,800.00	5,050.00	1,500.00	1,000.00	4,550.00	31,500.00	18,000.00	40,050.00	159,500.00	175,350.00	175,350.00
*4320 · Registration	0.00	14,800.00	19,860.00	2,550.00	6,360.00	2,100.00	4,050.00	2,550.00	5,400.00	11,280.00	5,700.00	16,740.00	91,390.00	91,745.00	91,745.00
4330 · Miscellaneous	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,085.00	2,085.00	2,085.00	2,085.00
TOTAL REVENUES	6,344.78	41,486.82	47,755.15	9,814.44	28,331.13	13,000.22	11,383.33	11,055.07	15,793.85	48,613.33	29,533.33	66,408.33	329,519.82	349,180.00	349,180.00
EXPENSES															
5005 · Salaries & Wages	11,392.74	11,392.74	11,392.74	11,392.74	11,392.74	11,392.74	11,392.74	11,392.74	11,392.74	11,392.74	11,392.74	11,392.74	136,712.84	133,150.92	133,150.92
5015 · Retirement	642.85	642.85	642.85	642.85	642.85	642.85	642.85	642.85	642.85	642.85	642.85	642.85	7,714.24	7,514.76	7,514.76
5025 · Employee Benefits	931.43	931.43	931.43	931.43	931.43	931.43	931.43	931.43	931.43	931.43	931.43	931.43	11,177.14	10,631.40	10,631.40
5035 · Taxes - Payroll	937.05	937.05	937.05	937.05	937.05	937.05	937.05	937.05	937.05	937.05	937.05	937.05	11,244.61	11,022.84	11,022.84
5145 · Mileage	515.00	450.00	130.00	483.00	105.00	445.00	155.00	200.00	167.00	350.00	350.00	350.00	3,700.00	4,200.00	4,200.00
5150 · Telephone	130.00	130.00	130.00	130.00	130.00	130.00	130.00	130.00	130.00	130.00	130.00	130.00	1,560.00	1,560.00	1,560.00
5160 · Printing	0.00	0.00	160.00	0.00	0.00	0.00	0.00	0.00	0.00	480.00	0.00	0.00	640.00	200.00	200.00
5170 · Professional Development	3,500.00	0.00	0.00	0.00	1,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,000.00	5,250.00	5,250.00
5200 · Member Development	121.57	268.81	126.69	182.01	394.63	713.51	478.12	577.55	630.11	300.00	407.00	300.00	4,500.00	3,600.00	3,600.00
5205 · Member Services	46.00	117.53	35.29	288.97	270.60	703.89	608.01	301.98	680.98	391.00	483.21	972.54	4,900.00	4,700.00	4,700.00
5345 · Travel/Mtgs/Meals	8.00	118.85	34.76	178.54	210.00	46.00	30.00	205.41	20.68	50.00	50.00	47.76	1,000.00	550.00	550.00
7300 · Program Expense															
*7301 · Supplies	0.00	336.00	636.00	136.00	175.00	0.00	336.00	136.00	136.00	236.00	0.00	161.00	2,288.00	475.00	475.00
*7305 · Marketing	0.00	4,106.00	960.00	500.00	750.00	0.00	0.00	0.00	0.00	900.00	0.00	200.00	6,916.00	2,066.00	2,066.00
*7310 · Food & Beverage	0.00	10,500.00	5,778.00	500.00	6,000.00	2,028.00	1,900.00	500.00	2,028.00	11,675.00	3,250.00	11,028.00	55,187.00	57,725.00	57,725.00
*7315 · Postage	0.00	520.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	300.00	0.00	550.00	1,370.00	2,405.00	2,405.00
*7320 · Printing	0.00	250.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	575.00	0.00	650.00	1,475.00	2,590.00	2,590.00
*7325 · Facility/Booth	0.00	1,500.00	4,150.00	1,200.00	0.00	100.00	0.00	0.00	100.00	0.00	2,000.00	14,100.00	21,950.00	21,518.00	21,518.00
*7330 · Speaker/Presenter	0.00	1,300.00	5,000.00	0.00	0.00	1,400.00	250.00	1,200.00	1,400.00	1,200.00	5,000.00	0.00	14,900.00	7,700.00	7,700.00
*7390 · Miscellaneous	0.00	14,578.17	5,800.00	100.00	9,000.00	1,400.00	50.00	100.00	1,400.00	15,275.00	6,000.00	4,390.00	58,093.17	54,547.00	54,547.00
*7395 · Credit Card Processing Fees	0.00	300.00	1,150.00	100.00	720.83	100.00	50.00	100.00	125.00	675.00	350.00	550.00	4,220.83	4,075.00	4,075.00
TOTAL EXPENSES	18,224.64	48,379.43	37,994.81	17,102.59	33,160.13	19,570.47	17,841.20	17,255.01	19,321.84	46,441.07	31,924.28	47,333.37	354,548.83	335,480.92	335,480.92
NET INCOME	-11,879.86	-6,892.61	9,760.34	-7,288.15	-4,829.00	-6,570.25	-6,457.87	-6,199.94	-3,527.99	2,172.26	-2,390.95	19,074.96	-25,029.01	13,699.08	13,699.08

ONE SOUTHERN INDIANA
COMMUNITY MESSAGING
BUDGET FY 2019 2020

COMMUNITY MESSAGING	FY 2019/20												FY 2018/19	
	Jul-19 Budget	Aug-19 Budget	Sept-19 Budget	Oct-19 Budget	Nov-19 Budget	Dec-19 Budget	Jan-20 Budget	Feb-20 Budget	Mar-20 Budget	Apr-20 Budget	May-20 Budget	June-20 Budget	YTD Budget	Full-Year Budget
REVENUES														
4041 - Member2Member Elast	250.00	250.00	500.00	250.00	250.00	500.00	250.00	250.00	500.00	250.00	250.00	500.00	4,000.00	2,000.00
4050 - The One Weekly Ads	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	6,000.00	2,000.00
4060 - Weblink On-line Sales	0.00	0.00	0.00	1,000.00	0.00	0.00	1,000.00	0.00	0.00	0.00	0.00	0.00	2,000.00	3,500.00
0000 - Membership Directory Ad Sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0000 - Resource Guide Net Revenue	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15,500.00	15,500.00
TOTAL REVENUES	750.00	750.00	1,000.00	1,750.00	750.00	1,000.00	1,750.00	750.00	1,000.00	750.00	16,250.00	1,000.00	27,500.00	23,000.00
EXPENSES														
5005 - Salaries & Wages	7,884.25	7,884.25	7,884.25	7,884.25	7,884.25	7,884.25	7,884.25	7,884.25	7,884.25	7,884.25	7,884.25	7,884.25	94,611.01	91,877.76
5015 - Retirement	473.06	473.06	473.06	473.06	473.06	473.06	473.06	473.06	473.06	473.06	473.06	473.06	5,676.66	5,512.66
5025 - Employee Benefits	602.19	602.19	602.19	602.19	602.19	602.19	602.19	602.19	602.19	602.19	602.19	602.19	7,226.28	7,274.16
5035 - Taxes - Payroll	645.67	645.67	645.67	645.67	645.67	645.67	645.67	645.67	645.67	645.67	645.67	645.67	7,748.04	7,530.47
5140 - Marketing	3,600.00	3,600.00	3,600.00	3,600.00	3,600.00	3,600.00	3,600.00	3,600.00	3,600.00	3,600.00	3,600.00	3,600.00	45,948.00	48,120.00
5145 - Mileage	25.00	100.00	50.00	100.00	100.00	50.00	25.00	50.00	50.00	100.00	100.00	50.00	800.00	1,000.00
5150 - Telephone	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	960.00	1,000.00
5160 - Printing	0.00	0.00	160.00	0.00	0.00	0.00	0.00	0.00	0.00	160.00	0.00	0.00	320.00	0.00
5170 - Professional Development	1,020.00	0.00	1,800.00	0.00	0.00	0.00	0.00	0.00	0.00	480.00	0.00	1,500.00	4,800.00	4,000.00
5190 - Weblink Database	0.00	400.00	0.00	0.00	0.00	995.00	0.00	0.00	7,605.00	0.00	0.00	0.00	9,000.00	9,000.00
5215 - Buyers Guide (printing & mailing)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	0.00	1,000.00	1,000.00
5345 - Travel/Mtgs/Meals	25.00	0.00	25.00	0.00	25.00	25.00	25.00	0.00	25.00	25.00	0.00	25.00	200.00	300.00
5355 - Website	4,200.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10,000.00	8,325.00	0.00	0.00	22,525.00	12,500.00
TOTAL EXPENSES	18,555.17	13,785.17	15,320.17	13,385.17	13,410.17	14,355.17	13,335.17	14,435.17	30,965.17	22,375.17	15,485.17	15,408.17	200,814.99	189,115.05
NET INCOME	-17,805.17	-13,035.17	-14,320.17	-11,635.17	-12,660.17	-13,355.17	-11,585.17	-13,685.17	-29,965.17	-21,625.17	764.83	-14,408.17	-173,314.99	-166,115.05

ONE SOUTHERN INDIANA
ADVOCACY
BUDGET FY 2019 2020

ADVOACAY	Jul-19 Budget	Aug-19 Budget	Sept-19 Budget	Oct-19 Budget	Nov-19 Budget	Dec-19 Budget	Jan-20 Budget	Feb-20 Budget	Mar-20 Budget	Apr-20 Budget	May-20 Budget	June-20 Budget	YTD Budget	FY 2019/20 Budget	FY 2018/19 Budget
REVENUES															
4172 · Advocacy Revenue	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4172.01 · Public Policy	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4172.02 · Government Relations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
**4300 · Program & Project															
Revenue															
4310 · Sponsorship	0.00	0.00	600.00	0.00	1,000.00	0.00	800.00	0.00	800.00	0.00	0.00	0.00	3,200.00	0.00	2,400.00
4320 · Registration	0.00	0.00	750.00	0.00	1,500.00	0.00	500.00	0.00	750.00	0.00	0.00	0.00	3,500.00	0.00	2,250.00
4330 · Miscellaneous	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL REVENUES	0.00	0.00	1,350.00	0.00	2,500.00	0.00	1,300.00	0.00	1,550.00	0.00	0.00	0.00	6,700.00	0.00	4,650.00
EXPENSES															
5300 · Advocacy Expense															
5300.01 · Public Policy Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5345 · Travel/Mtgs/Meals	25.00	0.00	2,025.00	0.00	25.00	0.00	50.00	50.00	50.00	50.00	0.00	25.00	2,300.00	0.00	2,150.00
**7300 · Program Expense															
7301 · Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7305 · Marketing	0.00	0.00	50.00	0.00	50.00	0.00	50.00	0.00	50.00	0.00	0.00	0.00	200.00	0.00	150.00
7310 · Food & Beverage	0.00	0.00	425.00	0.00	425.00	0.00	325.00	0.00	425.00	0.00	0.00	0.00	1,600.00	0.00	1,275.00
7315 · Postage	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7320 · Printing	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7325 · Facility/Booth	0.00	0.00	500.00	0.00	500.00	0.00	0.00	0.00	500.00	0.00	0.00	0.00	1,500.00	0.00	150.00
7330 · Speaker/Presenter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7390 · Miscellaneous	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7395 · Credit Card Processing Fees	0.00	0.00	20.00	0.00	50.00	0.00	20.00	0.00	20.00	0.00	0.00	0.00	110.00	0.00	60.00
TOTAL EXPENSES	25.00	0.00	3,020.00	0.00	1,050.00	0.00	445.00	50.00	1,045.00	50.00	0.00	25.00	5,710.00	990.00	3,785.00
NET INCOME	-25.00	0.00	-1,670.00	0.00	1,450.00	0.00	855.00	-50.00	505.00	-50.00	0.00	-25.00	990.00	0.00	865.00

ONE SOUTHERN INDIANA
INCOME STATEMENT SUMMARY
PERIOD ENDING
05/31/2020

INCOME STATEMENT SUMMARY	YTD ACTUAL - Member & Investor Revenues		YTD ACTUAL Business Resources Revenues	YTD ACTUAL Community Messaging Revenues	YTD ACTUAL Collaborative Partnerships Revenues	YTD ACTUAL Advocacy Revenues	YTD ACTUAL REVENUE - FY 2019/2020	2019/2020 Annual Revenues Budget	YTD ACTUAL REVENUE - FY 2018/2019
REVENUES									
4000 - Dues	348,790.79		0.00	0.00	0.00	0.00	348,790.79	417,310.08	343,246.86
4000 - MMA Dues	80,429.08		0.00	0.00	0.00	0.00	80,429.08	96,000.00	94,732.91
4010 - New Member Dues	0.00		70,158.38	0.00	0.00	0.00	70,158.38	70,000.00	64,617.90
4011 - Revolving Loan Fund	19,383.33		0.00	0.00	0.00	0.00	19,383.33	10,500.00	10,500.00
4015 - Membership Campaign	0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00
4041 - Member2Member Eblast	0.00		0.00	3,600.00	0.00	0.00	3,600.00	4,000.00	3,800.00
4050 - The One Weekly Ads	0.00		0.00	2,625.00	0.00	0.00	2,625.00	6,000.00	5,800.00
4060 - WebLink On-line Sales	0.00		0.00	2,293.52	0.00	0.00	2,293.52	2,000.00	0.00
4061 - Member Directory Ad Sales (BRG)	0.00		0.00	9,656.06	0.00	0.00	9,656.06	15,500.00	13,033.50
4062 - Publications	75.00		0.00	0.00	0.00	0.00	75.00	300.00	350.00
4150 - Investor Support	536,860.47		0.00	0.00	0.00	0.00	536,860.47	543,565.41	498,835.07
4170 - ED Grants -OSI Fo & Other	103,000.00		0.00	0.00	0.00	0.00	103,000.00	122,500.00	102,395.00
4168 - WorkHub	0.00		0.00	0.00	0.00	0.00	0.00	0.00	10,000.00
4180 - Interest	4,946.87		0.00	0.00	0.00	0.00	4,946.87	894.99	877.86
4190 - Miscellaneous	12,234.42		0.00	0.00	0.00	0.00	12,234.42	7,339.00	39,874.88
4300 - Affinity Programs	0.00		6,586.67	0.00	0.00	0.00	6,586.67	6,544.82	6,900.84
4301 - Program & Event Revenue	28,766.72		142,320.01	0.00	0.00	12,452.50	183,539.23	284,125.00	284,905.28
TOTAL REVENUES	1,144,486.68		219,065.06	18,174.58	0.00	12,452.50	1,394,178.82	1,586,579.30	1,479,870.10
	YTD Actual General & Admin Expenses	YTD Actual Economic Development Expenses	YTD Actual Business Resources Expenses	YTD Actual Community Messaging Expenses	YTD Actual Collaborative Partnerships Expenses	YTD Actual Advocacy Expenses	YTD ACTUAL EXPENSE - FY 2019/2020	2019/2020 Annual Expenses Budget	YTD ACTUAL EXPENSE - FY 2018/2019
EXPENSES									
5005 - Salaries / Wages / Incentives	281,268.81	240,994.17	136,493.88	86,881.65	0.00	0.00	745,638.51	833,230.48	760,798.26
5010 - Administrative Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5015 - Retirement	16,929.19	11,641.96	9,118.95	5,252.94	0.00	0.00	42,943.04	49,260.11	44,002.74
5025 - Employee Benefits	14,732.68	14,938.30	12,717.69	6,311.39	0.00	0.00	48,700.06	56,010.08	45,258.34
5035 - Taxes - Payroll	18,740.02	20,259.35	9,544.56	6,647.60	0.00	0.00	55,191.53	63,807.28	57,220.12
5105 - Building Lease	67,400.74	0.00	0.00	0.00	0.00	0.00	67,400.74	74,000.00	61,852.89
5106.01 - Building Insurance	1,721.00	0.00	0.00	0.00	0.00	0.00	1,721.00	1,850.00	1,644.00
5106.02 - Cyber Insurance	999.00	0.00	0.00	0.00	0.00	0.00	999.00	1,150.00	999.00
5115 - Copier	8,166.29	0.00	0.00	0.00	0.00	0.00	8,166.29	8,949.12	7,618.52
5120 - Credit Card Fees	3,198.62	0.00	0.00	0.00	0.00	0.00	3,198.62	3,900.00	2,270.98
5121 - Miscellaneous	809.70	0.00	0.00	809.70	0.00	0.00	809.70	600.00	900.49
5122 - Economic Dev. Grants	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5125 - Dues & Subscriptions	5,512.56	4,341.28	0.00	0.00	0.00	0.00	9,853.84	13,642.68	12,846.37
5130 - Equip/Rental/Lease	2,141.17	0.00	0.00	0.00	0.00	0.00	2,141.17	1,980.00	1,790.84
5135 - Board of Directors/ D&O Insurance	3,980.00	0.00	0.00	0.00	0.00	0.00	3,980.00	5,644.22	4,249.22
5140 - Marketing	0.00	0.00	0.00	11,337.32	0.00	0.00	11,337.32	45,948.00	14,865.32
5145 - Mileage	416.75	3,225.85	2,053.73	622.93	0.00	0.00	6,319.26	9,987.63	8,862.34
5150 - Telephone	6,119.89	2,295.21	1,290.00	880.00	0.00	0.00	10,585.10	13,269.99	10,299.66
5155 - Postage	1,418.00	0.00	0.00	0.00	0.00	0.00	1,418.00	1,700.00	1,339.54
5160 - Printing	1,042.13	0.00	0.00	0.00	0.00	0.00	1,042.13	3,982.00	3,132.76
5165 - Professional & Legal Fees	12,400.00	0.00	0.00	0.00	0.00	0.00	12,400.00	15,000.00	12,050.00
5166 - Professional Fee - Our Southern Indiana - Regional Cities Initiative	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5170 - Professional Development	828.44	5,905.85	221.00	982.57	0.00	0.00	7,937.86	24,242.92	15,390.71
5175 - Supplies	8,606.43	0.00	0.00	0.00	0.00	0.00	8,606.43	8,400.00	9,926.12
5180 - Staff Support	2,471.70	0.00	0.00	0.00	0.00	0.00	2,471.70	2,360.00	2,460.87
5185 - Tech Support & Software	21,005.27	0.00	0.00	0.00	0.00	0.00	21,005.27	24,951.00	21,706.43
5190 - WebLink Database	0.00	0.00	0.00	400.00	0.00	0.00	400.00	9,000.00	7,989.21
5200 - Member Development	0.00	0.00	2,598.99	0.00	0.00	0.00	2,598.99	4,500.00	4,078.13
5205 - Member Services	0.00	0.00	3,074.46	0.00	0.00	0.00	3,074.46	4,900.00	3,841.84
5215 - Membership Directory (printing & postage)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	963.34
0000 - Horseshoe Revolving Loan Fund Consultant Fees	0.00	6,030.00	0.00	0.00	0.00	0.00	6,030.00	5,680.00	4,860.00
5235 - Auto Allowance	5,400.00	0.00	0.00	0.00	0.00	0.00	5,400.00	7,200.00	6,600.00
5300 - Advocacy Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	147.50
*5301 - Talent (Workforce) Development	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5305 - Bus Retention & Expansion (BRE)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	0.00
5315 - Investor Relations	0.00	3,275.27	0.00	0.00	0.00	0.00	3,275.27	5,110.00	4,270.62
5320 - Lead Generation Consultants	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,600.00	0.00
5325 - Outreach	0.00	8,176.89	0.00	0.00	0.00	0.00	8,176.89	11,010.56	8,786.57
5330 - Prospect Development	0.00	293.12	0.00	0.00	0.00	0.00	293.12	4,430.00	2,593.36
5345 - Travel/Mtgs/Meals	1,348.33	3,805.26	1,335.34	358.19	0.00	27.00	6,874.12	9,600.95	9,031.31
5346 - Travel/Mtgs/Meals - Foreign	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7,000.00	4,519.78
5355 - Website	0.00	0.00	0.00	19,725.25	0.00	0.00	19,725.25	22,525.00	2,771.88
6000 - Equipment Depreciation & Bad Debt	15,662.24	0.00	0.00	0.00	0.00	0.00	15,662.24	19,300.00	16,248.48
6000 - Allowance for Doubtful	0.00	0.00	0.00	0.00	0.00	0.00	0.00	23,000.00	0.00
7300 - Program Expense	0.00	860.93	87,344.36	0.00	0.00	6,243.15	94,448.44	179,710.00	146,701.20
TOTAL EXPENSES	502,318.96	326,043.44	265,792.96	139,399.84	0.00	6,270.15	1,239,825.35	1,580,432.02	1,324,888.74
NET INCOME	316,124.28		(46,727.90)	(121,225.26)	0.00	6,182.35	154,353.47	6,147.28	154,981.36

ONE SOUTHERN INDIANA
 INCOME STATEMENT SUMMARY W/ VARIANCE
 PERIOD ENDING
 05/31/2020

INCOME SUMMARY STATEMENT	FY 2019/20 May-20	ACTUAL YTD - FY 2019-2020	ACTUAL YTD - FY 2018-2019	May-20 Budget	FY 2019/20 YTD Budget	Full-Year Budget	Variable			FY 2019/20 YTD ACTUAL vs. FY BUDGET
							May-20	YTD \$	YTD %	
REVENUES SUMMARY										
1 Member & Investor	106,523.46	1,144,486.68	1,138,662.58	44,324.18	1,133,739.30	1,222,859.48	62,199.28	10,747.38	0.95%	93.59%
2 Business Resource	10,482.73	219,065.06	302,799.02	29,533.33	263,111.49	329,519.82	-19,050.60	-44,046.43	-16.74%	66.48%
3 Community Messaging	12,656.06	18,174.58	22,633.50	16,250.00	26,500.00	27,500.00	-3,593.94	-8,325.42	-31.42%	66.09%
4 Advocacy	0.00	12,452.50	15,775.00	0.00	6,700.00	6,700.00	0.00	5,752.50	0.00%	185.86%
TOTAL REVENUES	129,662.25	1,394,178.82	1,479,870.10	90,107.51	1,430,050.79	1,586,579.30	39,554.74	-35,871.97	-2.51%	87.87%
EXPENSES SUMMARY										
6 General & Administrative	31,991.98	502,318.96	492,931.85	46,631.26	537,698.54	610,786.31	-14,639.28	-35,379.58	-6.58%	82.24%
7 Economic Development	29,436.97	326,043.44	385,997.65	38,791.26	367,481.63	408,571.89	-9,354.29	-41,438.19	-11.28%	79.80%
8 Business Resource	10,800.62	265,792.96	298,656.35	31,924.28	307,215.46	354,548.83	-21,123.66	-41,422.50	-13.48%	74.97%
9 Community Messaging	9,849.34	139,399.84	132,842.64	15,485.17	185,406.82	200,814.99	-5,635.83	-46,006.98	-24.81%	69.42%
10 Advocacy	0.00	6,270.15	14,460.25	0.00	5,685.00	5,710.00	0.00	585.15	10.29%	109.81%
TOTAL EXPENSES	82,078.91	1,239,825.35	1,324,888.74	132,831.97	1,403,487.45	1,580,432.02	-50,753.06	-163,662.10	-11.66%	78.45%
NET INCOME	47,583.34	154,353.47	154,981.36	-42,724.46	26,563.34	6,147.28	90,307.80	127,790.13	481.08%	2510.92%
NET INCOME SUMMARY										
1 Member, Investor & WorkHub Revenue	106,523.46	1,144,486.68	1,138,662.58	44,324.18	1,133,739.30	1,222,859.48	62,199.28	10,747.38	0.95%	93.59%
6 General & Administrative Expense	31,991.98	502,318.96	492,931.85	46,631.26	537,698.54	610,786.31	-14,639.28	-35,379.58	-6.58%	82.24%
7 Economic Development Expense	29,436.97	326,043.44	385,997.65	38,791.26	367,481.63	408,571.89	-9,354.29	-41,438.19	-11.28%	79.80%
Net Income Organizational Sustainability	45,094.51	316,124.28	259,733.08	-41,098.35	228,559.14	203,501.28	86,192.86	87,565.14	18.80%	155.34%
2 Business Resource Revenue	10,482.73	219,065.06	302,799.02	29,533.33	263,111.49	329,519.82	-19,050.60	-44,046.43	-16.74%	66.48%
8 Business Resource Expense	10,800.62	265,792.96	298,656.35	31,924.28	307,215.46	354,548.83	-21,123.66	-41,422.50	-13.48%	74.97%
Net Income Business Resources	-317.89	-46,727.90	4,142.67	-2,390.95	-44,103.97	-25,029.01	2,073.06	-2,623.93	-3.26%	186.69%
3 Community Messaging Revenue	12,656.06	18,174.58	22,633.50	16,250.00	26,500.00	27,500.00	-3,593.94	-8,325.42	-31.42%	66.09%
9 Community Messaging Expense	9,849.34	139,399.84	132,842.64	15,485.17	185,406.82	200,814.99	-5,635.83	-46,006.98	-24.81%	69.42%
Net Income Community Messaging	2,806.72	-121,225.26	-110,209.14	764.83	-158,906.82	-173,314.99	2,041.89	37,681.56	-6.60%	69.95%
4 Collaborative Partnerships Revenue	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
10 Collaborative Partnerships Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
Net Income Collaborative Partnerships	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
5 Advocacy Revenue	0.00	12,452.50	15,775.00	0.00	6,700.00	6,700.00	0.00	5,752.50	85.86%	185.86%
11 Advocacy Expense	0.00	6,270.15	14,460.25	0.00	5,685.00	5,710.00	0.00	585.15	10.29%	109.81%
Net Income Advocacy	0.00	6,182.35	1,314.75	0.00	1,015.00	990.00	0.00	5,167.35	75.57%	624.48%
NET INCOME SUMMARY	47,583.34	154,353.47	154,981.36	-42,724.46	26,563.34	6,147.28	90,307.80	127,790.13	481.08%	2510.92%

ASSETS						
Current Assets	May 2020	May 2019	April 2020	April 2019	May 2018	May 2017
1 Petty Cash	505.00		505.00		505.00	
2 Cash in Bank - Restricted/Unrestricted	939,138.18	939,643.18	725,395.22	725,900.22	660,640.41	661,145.41
3 Dues Receivable	64,136.54		64,359.24		64,114.08	
4 Allowance for Doubtful Accounts	(4,971.47)		(7,221.59)		0.00	
5 Other Receivable	1,065.25		1,078.30		5,114.58	
6 Program Receivable	15,993.34		32,908.34		17,794.49	
6a Grant Receivable	0.00		0.00		0.00	
6b Talent Development Receivable	0.00	76,223.66	0.00	91,124.29	0.00	87,023.15
7 Prepaid Expense	38,634.45	38,634.45	38,698.95	38,698.95	32,517.91	32,517.91
8 Total Current Assets		1,054,501.29		855,723.46		780,686.47
Property and Equipment						
9 Computer/Equipment	161,444.93		161,444.93		167,312.45	
10 Furniture/Fixtures	92,384.11		92,384.11		116,723.83	
11 Accumulated Depreciation	(187,599.42)		(186,175.58)		(175,559.06)	
12 Total Property and Equipment		66,229.62		67,653.46		108,477.22
13 Total Assets		1,120,730.91		923,376.92		889,163.69
Current Liabilities						
14 Accrued Vacation	51,797.74		51,797.74		47,628.67	
15 a Accrued Compensation	67,347.44		63,464.39		53,626.51	
15 b Accrued Payroll	(0.02)		(0.02)		0.00	
16 Indiana Sales Tax Payable	5.25		5.25		3.70	
*17 *Retirement Payable	3,166.68		22.77		22.79	
18 Employee Payable	0.00		0.00		0.00	
19 Deferred Dues	235,645.21		238,534.87		254,090.76	
20 Deferred Revenue - Program Income	114,260.30		117,216.96		59,011.09	
21 Accounts Payable	11,446.77		12,856.76		2,413.85	
22 Jeffersonville Sustains Loan Prgm	150,000.00		0.00		0.00	
23 Total Current Liabilities		633,669.37		483,898.72		431,548.84
Equity						
24 Net Assets-Operating	332,708.07		332,708.07		302,633.49	
25 Net Income	154,353.47		106,770.13		154,981.36	
26 Total Equity		487,061.54		439,478.20		457,614.85
27 Total Liabilities & Equity		1,120,730.91		923,376.92		889,163.69

17 *Retirement Payable -
 Note: 1si contributes 6% of the employee's GROSS compensation for full-time & part-time employees. 5.29.20 Payroll 401K Deposit paid in fiscal June 2020.

ONE SOUTHERN INDIANA
ORGANIZATIONAL SUSTAINABILITY
PERIOD ENDING
05/31/2020

MEMBER & INVESTOR REVENUES	FY 2019/20	ACTUAL		FY 2019/20		Variable			FY 2019/20
	May-20	YTD - FY 2019-2020	May-20 Budget	YTD Budget	Full-Year Budget	May-20	YTD \$	YTD %	YTD ACTUAL vs. FY BUDGET
REVENUES									
4000 · Current Dues	28,825.74	348,790.79	34,775.84	382,534.24	417,310.08	-5,950.10	-33,743.45	-8.82%	83.58%
4061 · Publications	0.00	75.00	0.00	0.00	300.00	0.00	75.00	0.00%	25.00%
4150 · Investor Support	55,500.00	536,860.47	873.34	498,835.07	543,565.41	54,626.66	38,025.40	7.62%	98.77%
4167 - Grant - SBA COVID-19	0.00	10,000.00		0.00	0.00	0.00	10,000.00	0.00%	0.00%
4180 · Interest	401.55	4,946.87	75.00	819.99	894.99	326.55	4,126.88	503.28%	552.73%
4190 · Miscellaneous	654.82	12,234.42	600.00	6,600.00	7,339.00	54.82	5,634.42	85.37%	166.70%
TOTAL REVENUES	85,382.11	912,907.55	36,324.18	888,789.30	969,409.48	49,057.93	24,118.25	2.71%	94.17%
GENERAL & ADMIN EXPENSES									
5005 · Salaries & Wages	14,982.31	281,268.81	26,798.81	298,464.60	325,263.41	-11,816.50	-17,195.79	-5.76%	86.47%
5015 · Retirement	898.94	16,929.19	1,508.49	17,762.13	19,270.62	-609.55	-832.94	-4.69%	87.85%
5025 · Employee Benefits	1,081.51	14,732.68	1,395.50	15,658.36	17,053.86	-313.99	-925.68	-5.91%	86.39%
5035 · Taxes - Payroll	1,102.87	18,740.02	1,738.63	20,675.45	22,414.08	-635.76	-1,935.43	-9.36%	83.61%
5105 · Building Lease	6,127.34	67,400.74	6,166.00	67,826.00	74,000.00	-38.66	-425.26	-0.63%	91.08%
5106 - Insurance									
5106.01 - Building Insurance	0.00	1,721.00	0.00	2,000.00	2,000.00	0.00	-279.00	-13.95%	86.05%
5106.02 - Cyber Insurance	0.00	999.00	0.00	1,000.00	1,000.00	0.00	-1.00	-0.10%	99.90%
5115 · Copier	736.93	8,166.29	695.76	8,253.36	8,949.12	41.17	-87.07	-1.05%	91.25%
5120 · Credit Card Fees	255.70	3,198.62	325.00	3,575.00	3,900.00	-69.30	-376.38	-10.53%	82.02%
5121 · Miscellaneous	0.00	809.70	50.00	550.00	600.00	-50.00	259.70	47.22%	134.95%
5125 · Dues & Subscriptions	758.94	5,512.56	50.00	6,425.00	7,425.00	708.94	-912.44	-14.20%	74.24%
5130 · Equip/Rental/Lease	178.99	2,141.17	155.00	1,825.00	1,980.00	23.99	316.17	17.32%	108.14%
5135 · Board of Directors									
5135.01 · General	0.00	0.00	85.00	1,124.22	1,644.22	-85.00	-1,124.22	-100.00%	0.00%
5135.02 · D&O Insurance	0.00	3,980.00	0.00	4,000.00	4,000.00	0.00	-20.00	-0.50%	99.50%
5145 · Mileage	12.25	416.75	80.00	880.00	960.00	-67.75	-463.25	-52.64%	43.41%
5150 · Telephone	559.99	6,119.89	660.00	7,260.00	7,920.00	-100.01	-1,140.11	-15.70%	77.27%
5155 · Postage	34.50	1,418.00	140.00	1,540.00	1,700.00	-105.50	-122.00	-7.92%	83.41%
5160 · Printing	0.00	1,042.13	0.00	1,490.00	2,545.00	0.00	-447.87	-30.06%	40.95%
5165 · Professional & Legal Fees	0.00	12,400.00	950.00	13,000.00	15,000.00	-950.00	-600.00	-4.62%	82.67%
5170 · Professional Development	58.00	828.44	700.00	6,000.00	6,500.00	-642.00	-5,171.56	-86.19%	12.75%
5175 · Supplies	1,722.46	8,606.43	700.00	7,700.00	8,400.00	1,022.46	906.43	11.77%	102.46%
5180 · Staff Support	41.98	2,471.70	180.00	2,360.00	2,360.00	-138.02	111.70	4.73%	104.73%
5185 · Tech Support & Software	2,015.43	21,005.27	1,969.74	22,662.75	24,951.00	45.69	-1,657.48	-7.31%	84.19%
5235 · Auto Allowance	0.00	5,400.00	600.00	6,600.00	7,200.00	-600.00	-1,200.00	-18.18%	75.00%
5345 · Travel/Mtgs/Meals	0.00	1,348.33	75.00	1,375.00	1,450.00	-75.00	-26.67	-1.94%	92.99%
**6000 · Depr and Amort - Allowance	1,423.84	15,662.24	1,608.33	17,691.67	19,300.00	-184.49	-2,029.43	-11.47%	81.15%
6000 · Bad Debt	0.00	0.00	0.00	0.00	23,000.00	0.00	0.00	0.00%	0.00%
TOTAL EXPENSES	31,991.98	502,318.96	46,631.26	537,698.54	610,786.31	-14,639.28	-35,379.58	-6.58%	82.24%
NET INCOME	53,390.13	410,588.59	-10,307.08	351,090.76	358,623.17	63,697.21	59,497.83	16.95%	114.49%

ONE SOUTHERN INDIANA
ECONOMIC DEVELOPMENT
PERIOD ENDING
05/31/2020

ECONOMIC DEVELOPMENT	FY 2019/20	ACTUAL		FY 2019/20		Variable			FY 2019/20
	May-20	YTD - FY 2019-2020	May-20 Budget	YTD Budget	Full-Year Budget	May-20	YTD \$	YTD %	YTD ACTUAL vs. FY BUDGET
REVENUES									
4168 - Workhub	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
4170 · ED Grants -OSI Fo. & HoosierEnergy Grants	0.00	103,000.00	0.00	122,500.00	122,500.00	0.00	-19,500.00	-15.92%	84.08%
4005 MMA Member Dues	7,408.02	80,429.08	8,000.00	88,000.00	96,000.00	-591.98	-7,570.92	-8.60%	83.78%
4006 - Revolving Loan Fund	13,583.33	19,383.33	0.00	10,500.00	10,500.00	13,583.33	8,883.33	84.60%	184.60%
4300 · Program & Project Revenue									
4310 · Sponsorship	150.00	28,766.72	0.00	23,950.00	24,450.00	150.00	4,816.72	20.11%	117.66%
4320 · Registration	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
TOTAL REVENUES	21,141.35	231,579.13	8,000.00	244,950.00	253,450.00	13,141.35	-13,370.87	-5.46%	91.37%
EXPENSES									
5005 · Salaries & Wages	22,776.54	240,994.17	23,053.60	253,589.62	276,643.22	-277.06	-12,595.45	-4.97%	87.11%
5015 · Retirement	1,042.43	11,641.96	1,383.22	15,215.37	16,598.59	-340.79	-3,573.41	-23.49%	70.14%
5025 · Employee Benefits	1,617.06	14,938.30	1,712.73	18,840.07	20,552.80	-95.67	-3,901.77	-20.71%	72.68%
5035 · Taxes - Payroll	1,866.46	20,259.35	1,866.71	20,533.84	22,400.55	-0.25	-274.49	-1.34%	90.44%
5125 · Dues & Subscriptions	240.00	4,341.28	300.00	5,764.68	6,217.68	-60.00	-1,423.40	-24.69%	69.82%
5130 · Equip/Rental/Lease	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
5145 · Mileage	0.00	3,225.85	500.00	4,066.63	4,527.63	-500.00	-840.78	-20.68%	71.25%
5150 · Telephone	250.59	2,295.21	225.00	2,379.99	2,829.99	25.59	-84.78	-3.56%	81.10%
5155 · Postage	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
5160 · Printing	0.00	0.00	0.00	477.00	477.00	0.00	-477.00	-100.00%	0.00%
5170 · Professional Development	123.00	5,905.85	1,000.00	7,942.92	7,942.92	-877.00	-2,037.07	-25.65%	74.35%
0000 - Horseshoe Revolving Loan Fund	720.00	6,030.00	0.00	4,580.00	5,680.00	720.00	1,450.00	31.66%	106.16%
5305 · Bus Retention & Expansion (BRE)	0.00	0.00	100.00	1,000.00	1,000.00	-100.00	-1,000.00	-100.00%	0.00%
5315 · Investor Relations	794.05	3,275.27	400.00	4,285.00	5,110.00	394.05	-1,009.73	-23.56%	64.10%
5320 · Lead Generation Consultants	0.00	0.00	600.00	600.00	1,600.00	-600.00	-600.00	-100.00%	0.00%
5325 · Outreach	0.00	8,176.89	2,650.00	9,410.56	11,010.56	-2,650.00	-1,233.67	-13.11%	74.26%
5330 · Prospect Development	0.00	293.12	600.00	2,930.00	4,430.00	-600.00	-2,636.88	-90.00%	6.62%
5345 · Travel/Mtgs/Meals	0.00	3,805.26	900.00	4,250.95	4,650.95	-900.00	-445.69	-10.48%	81.82%
5346 · Travel/Mtgs/Meals/Mktg - International	0.00	0.00	3,500.00	7,000.00	7,000.00	-3,500.00	-7,000.00	-100.00%	0.00%
7300 · Program Expense									
7301 · Supplies	0.00	44.95	0.00	1,680.00	5,415.00	0.00	-1,635.05	-97.32%	0.83%
7305 · Marketing	0.00	213.00	0.00	1,310.00	1,310.00	0.00	-1,097.00	-83.74%	16.26%
7310 · Food & Beverage	0.00	468.94	0.00	1,100.00	2,650.00	0.00	-631.06	-57.37%	17.70%
7315 · Postage	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
7320 · Printing	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
7325 · Facility/Booth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
7330 · Speaker/Presenter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
7390 · Miscellaneous	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
7395 · Credit Card Processing Fees	6.84	134.04	0.00	525.00	525.00	6.84	-390.96	-74.47%	25.53%
TOTAL EXPENSES	29,436.97	326,043.44	38,791.26	367,481.63	408,571.89	-9,354.29	-41,438.19	-11.28%	79.80%
NET INCOME	-8,295.62	-94,464.31	-30,791.26	-122,531.63	-155,121.89	22,495.64	28,067.32	-22.91%	60.90%

ONE SOUTHERN INDIANA
BUSINESS RESOURCES
PERIOD ENDING
05/31/2020

BUSINESS RESOURCES	FY 2019/20	ACTUAL		FY 2019/20		Variable			FY 2019/20
	May-20	YTD - FY 2019-2020	May-20 Budget	YTD Budget	Full-Year Budget	May-20	YTD \$	YTD %	YTD ACTUAL vs. FY BUDGET
REVENUES									
4010 · New Member Dues	5,239.50	70,158.38	5,833.33	64,166.67	70,000.00	-593.83	5,991.71	9.34%	100.23%
4330 · Affnity Income	1,743.23	6,586.67	0.00	4,844.82	6,544.82	1,743.23	1,741.85	35.95%	100.64%
4300 · Program/Event Revenue									
*4310 · Sponsorship	3,500.00	89,675.01	18,000.00	119,450.00	159,500.00	-14,500.00	-29,774.99	-24.93%	56.22%
*4320 · Registration	0.00	52,545.00	5,700.00	74,650.00	91,390.00	-5,700.00	-22,105.00	0.00%	57.50%
4330 · Miscellaneous	0.00	100.00	0.00	0.00	2,085.00	0.00	100.00	0.00%	4.80%
TOTAL REVENUES	10,482.73	219,065.06	29,533.33	263,111.49	329,519.82	-19,050.60	-44,046.43	-16.74%	66.48%
EXPENSES									
5005 · Salaries & Wages	8,380.93	136,493.88	11,392.74	125,320.10	136,712.84	-3,011.81	11,173.78	8.92%	99.84%
5015 · Retirement	512.62	9,118.95	642.85	7,071.39	7,714.24	-130.23	2,047.56	28.96%	118.21%
5025 · Employee Benefits	1,068.70	12,717.69	931.43	10,245.71	11,177.14	137.27	2,471.98	24.13%	113.78%
5035 · Taxes - Payroll	426.18	9,544.56	937.05	10,307.56	11,244.61	-510.87	-763.00	-7.40%	84.88%
5145 · Mileage	0.00	2,053.73	350.00	3,350.00	3,700.00	-350.00	-1,296.27	-38.69%	55.51%
5150 · Telephone	40.00	1,290.00	130.00	1,430.00	1,560.00	-90.00	-140.00	-9.79%	82.69%
5160 · Printing	0.00	0.00	0.00	640.00	640.00	0.00	-640.00	0.00%	0.00%
5170 · Professional Development	111.00	221.00	0.00	5,000.00	5,000.00	111.00	-4,779.00	-95.58%	4.42%
5200 · Member Development	63.77	2,598.99	407.00	4,200.00	4,500.00	-343.23	-1,601.01	-38.12%	57.76%
5205 · Member Services	63.77	3,074.46	483.21	3,927.46	4,900.00	-419.44	-853.00	-21.72%	62.74%
5345 · Travel/Mtgs/Meals	0.00	1,335.34	50.00	952.24	1,000.00	-50.00	383.10	40.23%	133.53%
7300 · Program/Event Expense									
*7301 · Supplies	0.00	962.46	0.00	2,127.00	2,288.00	0.00	-1,164.54	-54.75%	42.07%
*7305 · Marketing	0.00	14,765.05	0.00	6,716.00	6,916.00	0.00	8,049.05	119.85%	213.49%
*7310 · Food & Beverage	0.00	28,239.24	3,250.00	44,159.00	55,187.00	-3,250.00	-15,919.76	-36.05%	51.17%
*7315 · Postage	0.00	421.97	0.00	820.00	1,370.00	0.00	-398.03	-48.54%	30.80%
*7320 · Printing	0.00	0.00	0.00	825.00	1,475.00	0.00	-825.00	-100.00%	0.00%
*7325 · Facility/Booth	0.00	4,088.50	2,000.00	7,850.00	21,950.00	-2,000.00	-3,761.50	-47.92%	18.63%
*7330 · Speaker/Presenter	0.00	11,150.00	5,000.00	14,900.00	14,900.00	-5,000.00	-3,750.00	-25.17%	74.83%
*7390 · Miscellaneous	0.00	25,049.47	6,000.00	53,703.17	58,093.17	-6,000.00	-28,653.70	-53.36%	43.12%
*7395 · Credit Card Processing Fees	133.65	2,667.67	350.00	3,670.83	4,220.83	-216.35	-1,003.16	-27.33%	63.20%
TOTAL EXPENSES	10,800.62	265,792.96	31,924.28	307,215.46	354,548.83	-21,123.66	-41,422.50	-13.48%	74.97%
NET INCOME	-317.89	-46,727.90	-2,390.95	-44,103.97	-25,029.01	2,073.06	-2,623.93	5.95%	186.69%

ONE SOUTHERN INDIANA
COMMUNITY MESSAGING
PERIOD ENDING
05/31/2020

COMMUNITY MESSAGING	FY 2019/20		ACTUAL		FY 2019/20		Variable			FY 2019/20
	May-20	YTD - FY 2019-2020	May-20 Budget	YTD Budget	Full-Year Budget	May-20	YTD \$	YTD %	YTD ACTUAL vs. FY BUDGET	
REVENUES										
4041 - Member2Member Eblast	2,250.00	3,600.00	250.00	3,500.00	4,000.00	2,000.00	100.00	2.86%	90.00%	
4050 - The One Weekly Ads	750.00	2,625.00	500.00	5,500.00	6,000.00	250.00	-2,875.00	-52.27%	43.75%	
4060 - WebLink On-line Sales	0.00	2,293.52	0.00	2,000.00	2,000.00	0.00	293.52	14.68%	114.68%	
0000 - Membership Directory Ad Sales		0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%	
0000 - Resource Guide Net Revenue	9,656.06	9,656.06	15,500.00	15,500.00	15,500.00		-5,843.94	-37.70%	62.30%	
TOTAL REVENUES	12,656.06	18,174.58	16,250.00	26,500.00	27,500.00	2,250.00	-2,481.48	-9.36%	66.09%	
EXPENSES										
5005 - Salaries & Wages	7,642.25	86,881.65	7,884.25	86,726.76	94,611.01	-242.00	154.89	0.18%	91.83%	
5015 - Retirement	458.54	5,252.94	473.06	5,203.61	5,676.66	-14.52	49.33	0.95%	92.54%	
5025 - Employee Benefits	573.32	6,311.39	602.19	6,624.09	7,226.28	-28.87	-312.70	-4.72%	87.34%	
5035 - Taxes - Payroll	565.68	6,647.60	645.67	7,102.37	7,748.04	-79.99	-454.77	-6.40%	85.80%	
5140 - Marketing	467.55	11,337.32	4,700.00	41,800.00	45,948.00	-4,232.45	-30,462.68	-72.88%	24.67%	
5145 - Mileage	0.00	622.93	100.00	750.00	800.00	-100.00	-127.07	-16.94%	77.87%	
5150 - Telephone	80.00	880.00	80.00	880.00	960.00	0.00	0.00	0.00%	91.67%	
5160 - Printing	0.00	0.00	0.00	320.00	320.00	0.00	-320.00	0.00%	0.00%	
5170 - Professional Development	32.00	982.57	0.00	3,300.00	4,800.00	32.00	-2,317.43	-70.23%	20.47%	
5190 - WebLink Database	0.00	400.00	0.00	9,000.00	9,000.00	0.00	-8,600.00	-95.56%	4.44%	
5215 - Membership Directory & Buyers Guide (printing & mailing)	0.00	0.00	1,000.00	1,000.00	1,000.00	-1,000.00	-1,000.00	0.00%	0.00%	
5345 - Travel/Mtgs/Meals	0.00	358.19	0.00	175.00	200.00	0.00	183.19	104.68%	179.10%	
5355 - Website	30.00	19,725.25	0.00	22,525.00	22,525.00	30.00	-2,799.75	-12.43%	87.57%	
TOTAL EXPENSES	9,849.34	139,399.84	15,485.17	185,406.82	200,814.99	-5,635.83	-46,006.98	-24.81%	69.42%	
NET INCOME	2,806.72	-121,225.26	764.83	-158,906.82	-173,314.99	7,885.83	37,681.56	-23.71%	69.95%	

ONE SOUTHERN INDIANA
ADVOCACY
PERIOD ENDING
05/31/2020

ADVOCACY	FY 2019/20	ACTUAL		FY 2019/20		Variable			FY 2019/20
	May-20	YTD - FY 2019-2020	May-20 Budget	YTD Budget	Full-Year Budget	May-20	YTD \$	YTD %	YTD ACTUAL vs. FY
REVENUES									
4172 · Advocacy Revenue									
**4300 · Program & Project Revenue									
4310 · Sponsorship	0.00	9,567.50	0.00	3,200.00	3,200.00	0.00	6,367.50	198.98%	298.98%
4320 · Registration	0.00	2,885.00	0.00	3,500.00	3,500.00	0.00	-615.00	-17.57%	82.43%
4330 · Miscellaneous	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
TOTAL REVENUES	0.00	12,452.50	0.00	6,700.00	6,700.00	0.00	5,752.50	85.86%	185.86%
EXPENSES									
5300 · Advocacy Expense									
5300.01 · Public Policy Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
5345 · Travel/Mtgs/Meals	0.00	27.00	0.00	2,275.00	2,300.00	0.00	-2,248.00	-98.81%	1.19%
**7300 · Program Expense									
7301 · Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%
7305 · Marketing	0.00	53.00	0.00	200.00	200.00	0.00	-147.00	-73.50%	26.50%
7310 · Food & Beverage	0.00	4,132.56	0.00	1,600.00	1,600.00	0.00	2,532.56	158.29%	258.29%
7325 · Facility/Booth	0.00	0.00	0.00	1,500.00	1,500.00	0.00	-1,500.00	-100.00%	0.00%
7390 · Miscellaneous	0.00	1,900.00	0.00	0.00	0.00	0.00	1,900.00	0.00%	0.00%
7395 · Credit Card Processing Fees	0.00	157.59	0.00	110.00	110.00	0.00	47.59	43.26%	143.26%
TOTAL EXPENSES	0.00	6,270.15	0.00	5,685.00	5,710.00	0.00	585.15	10.29%	109.81%
NET INCOME	0.00	6,182.35	0.00	1,015.00	990.00	0.00	5,167.35	509.10%	624.48%

FINANCE: How has the chamber planned for future financial management?

Organizational Sustainability is one of the five pillars of One Southern Indiana's (1si) strategic plan. In order to actualize 1si's mission: "To help businesses thrive in the Southern Indiana and metro area," our organization must have enough funding to execute the organization's plans and operations. Financial management has been a focal point this year and continues to be of paramount importance due to the current pandemic environment.

As in most smaller organizations with limited budget and staff size, the Financial Management role in 1si is fulfilled by a single staff member. To ensure that our management and Board are leading the organization with timely and accurate financial information, 1si has continued to make advancements to each of the three main areas of our financial management:

- Operational Accounting
- Controllership
- Strategic Accounting

Within *Operational Accounting*, a mobile cloud-based payroll application was secured. The automation has provided much needed "real time" views of employee accrued benefit time, easy mobile or desktop clock in/out procedures and time off requests requiring direct supervisor approval. This platform continues to add benefits in both efficiency and staff support. The platform supports future goals of additional online functions, including: employee onboarding, employee access to their HR records, employee checklists and acknowledgements, and personalized year-end benefit reports.

Rolling Forecast and Cash Flow Projection tools have been instrumental this fiscal year as we have experienced unprecedented financial challenges. These tools in conjunction with our Financial Dashboard and Income Statement documents have provided a much more balanced picture of our financial outlook allowing management and our Board to make informed decisions relating to our organizational sustainability. Future dictates a broader view, through enhanced financial reporting, of the short-term and long-term financial goals will protect the organization from making decisions based upon the past month's financial results as compared to budget. The *Controllership* aspect of our financial management is more crucial than ever, as the financial landscape is constantly changing and cash flow is critical to our ability to execute organizational strategy while maintaining sustainability. Reporting accuracy, month-end reconciliation and adjustments continue to provide management and the Board GAPP Financial Statements by which to govern and direct the organization.

Strategic Accounting within the finance management function has experienced the most advancement and provides the foundation for our future financial strategy. By tying the financial goals back to our Plan of Work, we have grown cash on hand, improved interest earnings and rebates, created new non-dues revenue centers and have made significant strides in reducing expense categories through tracking, budget reconciliation and vendor negotiation. Financial management is not just accounting, but a layered approach to being a good steward of membership dues and investment. With a strong cash position going into the pandemic, we have secured our future, but that is not enough. Future viability and growth are integral to achieving our mission and therefore, continued revenue growth, technology enhancements and efficiencies are key.

Our adoption of financial management tools has helped us communicate with our Board of Directors on big picture goals for the organization. The Dashboard and Rolling Forecast allow a dialogue around revenue objectives for our team – lead by our Chief Revenue Director – to target. Both revenues and expenses are reviewed with our Finance Committee, and the Board has established a goal of keeping 3.0 months of operating expenses.

Our financial reports dated February 29, 2020 gave us a new all-time high for 1si, showing that we had 5.21 months of operating expenses cash on hand. The Executive Committee of our Board of Directors began dialogue around strategic investments we should consider in an effort to enhance our future growth opportunities.

However, with the onset of economic contraction in response to the COVID-19 pandemic, those conversations halted. Instead, we have utilized our cash on hand – along with tightening our belt – to continue providing 1si services to Southern Indiana businesses with minimal impact to our staffing levels.



2020 ADVOCACY AGENDA

The role of One Southern Indiana (1si) in promoting a fiscally stable, business-friendly environment is deeply impacted by local, regional, state and national issues. Through our Advocacy Council's initiatives, we promote positive change by serving as the "Champions of Ideas" to achieve economic and business vitality for the region. Additionally, we strive to provide for our investors and members access to policy makers at all levels of government through forums, roundtables and one-on-one meetings.

The 2020 Advocacy Agenda, as presented, provides the basis for 1si Advocacy positions over the next 12 months. These positions will be monitored and supported while new 1si Advocacy policies and processes are implemented during the next several months. The goal of these policies is to further establish 1si as the voice for Southern Indiana businesses.

CAREER-READY WORKFORCE AND EDUCATIONAL INITIATIVES

New business growth, along with the retention and expansion of existing businesses, is increasingly more dependent on the availability of a qualified workforce. 1si will monitor and communicate on the following priority areas:

Coordinated Voice of the Demand Side of the Talent/Workforce Equation

Because of significant job growth in Southern Indiana and low unemployment rates, 1si members are experiencing difficulty in hiring talented individuals to fill the open positions within their organizations. This talent shortage is not limited to a particular industry sector— it is common to all employers. While there are several resource providers and partners working on the talent supply side, 1si has assumed our role as the voice of the demand side of the equation. We will engage in efforts to coordinate this voice on behalf of area employers.

Higher Education

We support and encourage efforts to increase the percentage of our population that has attained Bachelors or Associates degrees in fields of study that are in demand by area employers, as identified by the Region 10 Works Council.

Post-Secondary Completion, Skills Training, Certifications and Licenses

We support and encourage efforts to increase the percentage of our population that has attained degrees, skill enhancements, technical certifications and licensing which are in demand by area employers.

Innovations in K-12 Education

We support and encourage efforts of area school corporations to advance the college and career preparedness of our youth, starting in early levels. These innovations should include both in-school and out-of-classroom programming for students and teachers.

Evaluating Public Funding for Schools

1si supports fiscally responsible investments in our education systems that result in quality educational opportunities for all learners. These investments must result in measurable increases towards establishing a competitive workforce. High-performing and competitive schools drive economic development, resulting in improvements for our workforce and our overall economy.

Licensure Reciprocity

With many of the region's companies operating across state lines, it is important for the region to maintain and attract talent. Indiana should pass legislation to authorize non-legal professionals and skilled trades to maintain their in-state licenses and practice in Kentucky. A seamless licensure process will benefit professionals, skilled trades, and employers as they provide services on both sides of the river. 1si not only encourages Indiana to move forward with licensure reciprocity, but also supports the initiation of similar efforts in Kentucky.

INFRASTRUCTURE AND TRANSPORTATION

A strong infrastructure network is key to serving the region's existing employers, attracting new companies and growing startup entities. We encourage efforts to identify the critical gaps and develop recommendations for infrastructure that will support economic growth strategies for Southern Indiana. 1si will monitor and communicate on the following priority areas:

Development of Connector Road from I-65 Exit 7 to River Ridge

Encourage the design and construction of a new road west from Exit 7 from I-65, passing the Clark Regional Airport, and connecting to Highway 62 at the River Ridge Commerce Center to realize economic development resulting from enhanced movement of cargo.

Communications Infrastructure

Communications infrastructure is not always categorized as an essential service, but in today's environment, the lack of high-speed internet connectivity can severely limit growth of existing businesses, hamper the attraction of new businesses and resident workers and dissuade e-learning. 1si will assist all service providers and collaborative partners in the push for the expansion of these services within Southern Indiana.

Ohio River Aquifer Study

1si supported legislation requiring study of the aquifer to not only identify and examine measures necessary to link water distribution systems, but also to study ownership rights in the groundwater resources shared by Indiana and Kentucky. After the 2017 passage of legislation to create an interstate groundwater commission, 1si encourages the administration to not only move forward with this commission, but also supports efforts to pass similar legislation in Kentucky.

Minimize Impact from Sherman Minton Bridge Project

1si acknowledges the need for the rehabilitating and painting project to extend the service life the Sherman Minton Bridge. We will actively seek updates and offer input to INDOT and project partners for assistance and understanding, with the goal of keeping communication channels open to resolve issues and concerns as they arise. Our goal is to minimize the economic impact to our business community.

BUSINESS-FRIENDLY INITIATIVES TO INCREASE INDIANA'S COMPETITIVENESS

Indiana has made great strides over the past decade to enhance the business friendliness of the state's fiscal policies. However, efforts toward continuous improvement are needed to maintain Indiana's competitiveness – as well as maintaining local advantages – because other locations are constantly adjusting their policies toward improvement. 1si will monitor and communicate on the following priority areas:

Support Proper Use of Tax Increment Financing (TIF) as an Economic Development Tool

Local municipalities have very few economic development tools to help "close the gap" to land new projects or retain existing employers. Maintaining the ability for local governments to use tax increment financing mechanisms for measurable economic development gains is essential for state and local competitiveness.

Incentive Reciprocity

Both Indiana and Kentucky provide incentives to new and existing companies to create new job opportunities. However, both states only allow credit for jobs that are filled by residents of the respective state, creating a disadvantage to hiring individuals who live in the region. 1si will advocate for reciprocity so that hiring incentives can be maximized for regional benefit. The intended result is to allow companies to hire the best candidates, regardless of their location within the region, and discourage "river hopping" amongst regional companies.

Brownfield Assistance

Redevelopment of abandoned or under-utilized properties present both an opportunity and a challenge to our local communities. Designations of much of our downtown areas as "Opportunity Zones" can enhance the attractiveness for redevelopment. An increased state focus to prioritize remediated properties in these areas can assist in creating new economic development opportunities as well as creating livability in areas that need additional assistance.

Training for Local Elected and Appointed Officials

The fiscal accountability requirements on local governments are increasingly complex. Elected and appointed officials at the local level should be properly trained on legal, procedural and reporting requirements early in their terms to ensure that proper techniques are instituted immediately as new officials take office. This will ensure economic security for local governments is protected before irreparable mistakes are made.

Provide Protections for Pregnant Workers

As Kentucky and 26 other states have provided legal clarity and guidance for employers in providing reasonable accommodations for pregnant workers, 1si encourages Indiana to be the next to adopt legislation that would help deter avoidable litigation and support workforce participation among women, in addition to improved health outcomes for mothers and babies.

Enhancing Treatment and Recovery Efforts

Employers and stakeholders in southern Indiana continue to monitor the detrimental effects of substance use disorders on the workforce. 1si encourages and supports the creation of innovative programs and funding designed to prevent, treat and support employees in the many facets of this epidemic.

REGIONAL INITIATIVES

Coordinating the activities and positions of the communities in Clark and Floyd counties offers several advantages – and creates greater influence – when compared to individual community agendas in other parts of the state. Additionally, recognizing our connectivity to Louisville adds impact in policy discussions that cross state and other jurisdictional boundaries. 1si will monitor and communicate on the following priority areas:

Support the Our Southern Indiana Regional Development Authority

While Southern Indiana can gain more influence by working regionally, the lack of sustainable funding for the RDA's initiatives creates uncertainty for its future role in regional activity. 1si will continue to support incentives for regional cooperation and regional project funding.

Implement and Maximize Regional Benefits from the River Heritage Conservancy Plan

The River Heritage Conservancy is creating a Master Plan which puts forth a vision for a world-class park system along the Ohio River. 1si encourages the further planning, development and construction of this vision which will greatly add to Southern Indiana's quality of place.

Collaboration for Regional Benefit

1si will continue to partner with other like-minded business organizations to unify our regional efforts of strengthening our regional economic stability and impact. Through these partnerships we create the opportunity to share ideas and information as well as forge greater collective influence on matters of common concern. It is time for our region take steps to solidify and develop an emboldened advocacy effort to ensure a strong presence at the Indiana Statehouse.

Expand Direct Air Service from SDF

1si is supportive of the Louisville Regional Airlift Development (LRAD) in its quest to develop new nonstop air service routes from Louisville International Airport (SDF) as the resulting economic development opportunities will benefit the entire region. Individuals, businesses, and other organizations – including the State of Indiana – can support this drive by making a tax-deductible pledge to provide funds to be used for minimum revenue guarantees to support the launch of the recently announced direct route to Los Angeles as well as new air service destinations from SDF.

CIVIC ENGAGEMENT

Harnessing the voice of business is essential for good policy at all levels of government. By providing forums and events to increase access to policy makers for our business members and investors, 1si will ensure that local issues are heard. 1si will promote civic engagement of our business members in the following priority areas:

Conduct One Educational Advocacy Event Each Year for Members and Investors

With continual changes in regulations that affect businesses of all sizes, 1si will host educational forums for local businesses to access technical updates and opinions from subject matter experts in those fields.

Host Four Advocacy Events Each Year for Local, State and Federal Officials

In keeping with the tradition of providing access to public officials, the Advocacy Council will host sessions with elected officials at three primary levels of government.

Unscripted: Sen. Braun addresses issues facing Southern Indiana businesses

- [By Tara Schmelz tara.schmelz@newsandtribune.com](mailto:tara.schmelz@newsandtribune.com)



U.S. Sen. Mike Braun talks of his time spent between Washington D.C. and hometown Jasper after taking the stage on Monday afternoon to begin the One Southern Indiana fire-side chat.

- [STAFF PHOTO BY TYLER STEWART](#)

JEFFERSONVILLE – Equipped with two copies of the News and Tribune and a TIME magazine, Wendy Dant Chesser, president and CEO of One Southern Indiana, sat across from Sen. Mike Braun [R-Indiana], ready to ask him the tough questions on issues facing businesses in Southern Indiana, such as economic development, tariffs, climate change and more.

U.S. Sen. Mike Braun discusses the importance of transportation in Southern Indiana in attracting companies for future growth within our region while talking with 1Si President Wendy Dant-Chesser at America Place.

The 1si member luncheon and "fireside chat," as it was dubbed, with Braun was strategically scheduled at America Place, in River Ridge, on Monday afternoon. Chesser said the location was picked to show Braun first-hand all the development and activity happening in the area.

Questions weren't revealed prior to the event and Braun answered each, live on the spot.

"He didn't talk from notes. He didn't ask for any questions in advance. We truly had a discussion about what I and, I think, One Southern Indiana members wanted to hear from our U.S. Senator," Chesser said.

One of the first questions Braun answered was about finding enough skilled workers to fill the available jobs. He talked about his business in Jasper, and his struggle to find workers.

"When [the Jasper area's] four school districts were stigmatizing, because they weren't guiding students and parents properly, that the only successful route in life was to get a 4-year degree. Never would I encourage anybody not strive for it, but when 60 percent of those that pursue it don't hit the finish line and none of the jobs – the 80,000 that can't be filled in Indiana – need one, common sense needs to start taking over," Braun told the crowd of 1si members. " ... The state is responding and I think we are finally addressing it."

He said he wants to keep it simple by having a sheet for parents and students that outlines what jobs are out there now, what the starting pay and career pay is and list out the cost of education for attaining those jobs. Chesser showed an article in the News and Tribune talking about a recent climate strike, in Jeffersonville. She asked his thoughts on the growing issue.

"I believe when you pump carbon in the air, it has a greenhouse effect ... The question is, what are you going to do about it?" Braun asked rhetorically. "I think it's got to be a balanced conversation."

Braun said part of balancing that conversation is involving China, who he said emits more pollutants than the U.S. Asked about tariffs on China's products, Braun said his top objective would be to stop tariffs completely, but felt they are needed in this case. He said China is seeking to grow economically, which will make them more powerful globally.

"Do you think it'll be easier to deal with [China] and mediate when they are our size and the answer is no," Braun said.

He doesn't foresee an ending coming up quickly.

"Will it end? Only if their economy starts to wobble and I think they have more patience than we have," he said. Braun answered many other questions on topics including healthcare reform, hemp production, national security, affordable housing and more.

Andrew Takami, director of Purdue Polytechnic in New Albany, said he agrees with much of Braun's views on higher education.

"Indiana is in the middle of the Midwest, so manufacturing is obviously very important," Takami said. "We are also focused on workforce development, because we know there are a great [number] of companies that need to be hiring our applied engineers, but also need to be hiring people at all different [skill] levels ... We are working to be uniquely situated in workforce development to meet the needs that companies have here or there, because it's about helping people be the best versions of themselves."

Doug Drake, president and CEO of Personal Counseling Service, said the only thing that surprised him about Braun's message was the tone.

"I was surprised by how authentic he is and how his message has been very consistent [when talking to various groups]," Drake said. "He's not the stereotypical politician, which is refreshing to me ... [Our country] was never

meant for career politicians. It was meant for people that come from the same roots that we do and they move up the ranks and they are able to lead from a perspective that they've been there and done that."

Chesser said this event is the first of a four-part advocacy series.

"1si members want access to decision makers. We can help provide that," Chesser said. "As we gauge the positions that our advocacy council takes on these issues, we need some of that background. We need to know what's actually happening in our nation's capital and our state capital so that we know where to engage."

Rep. Clere seeks to end headaches by entering Indiana into Nurse Licensure Compact

- [By MELISSA GOFORTH melissa.goforth@newsandtribune.com](mailto:melissa.goforth@newsandtribune.com) Jan 23, 2019

SOUTHERN INDIANA – State representative Ed Clere believes Indiana House Bill 1344 will cure the headaches being felt by local nurses, patients and healthcare organizations alike.

The bipartisan bill — authored by District 72 Rep. Clere, R-New Albany, and co-authored by Rep. Steven Davisson, R-73, and Rep. Robin Shackelford, D-98 — seeks to enter Indiana into the Interstate Nurse Licensure Compact [NLC].

Under the NLC, nurses can practice in other member states without having to obtain additional licenses.

Currently, there are 31 states already in the compact – including Kentucky. In addition to Indiana, the other states with pending NLC legislation are Michigan, New Jersey, Massachusetts and Washington.

The NLC pertains to registered nursing and licensed practical nursing licenses only. An advanced practice registered nurse (APRN) must hold an individual state license in each state of APRN practice.

House Bill 1344 is scheduled for a legislative hearing Wednesday afternoon. If successful, the bill will move on to the house floor next week, Clere said.

Currently, nurses in Indiana and Kentucky must obtain two separate licenses to practice in each state. That dual licensing can be both costly, as well as difficult to maintain, for nurses on both sides of the Ohio River.

Additionally, local healthcare systems that serve both Indiana and Kentucky are experiencing gaps in service because staff nurses without the dual licensing can't freely cross between the states to backfill when staffing is low at sister facilities.

Clere said this ultimately impacts local patients by limiting access to care due to those gaps in service.

The compact will help alleviate all the tension points, Clere believes.

“It's solving a workforce issue and it's an opportunity to improve patient access and care,” he said.

Clere first wrote the bill two years ago. However, last summer it went to a legislative study committee to ensure all questions and concerns were addressed, he said.

Now, the bill is making its way through the statehouse and, Clere said, its future has only improved over time.

“It has gained a lot of momentum and support over the past two years,” Clere said, adding he is “optimistic” that the bill will be received favorably by both the house and the state senate. He anticipates it will be signed into law this year.

Clere said he and many other legislators believe it is time Indiana joins the compact and increases the benefits to all involved across the state.

“We are not early adopters. Other states have proven this can work and that it has delivered on the promised benefits,” Clere said.

Hosparus was the first organization to approach Clere regarding the need for such a bill.

Gwen Cooper, a senior vice president with Hosparus Health, said her organization has worked with elected officials on both sides of the river, as well as Greater Louisville Inc. and One Southern Indiana, to push this initiative forward.

Hosparus Health is one of the top 20 nonprofit hospice organizations in the United States, serving nearly 8,000 patients and their families in 37 counties in Kentucky and Southern Indiana, according to the company's website.

Cooper said having staff nurses in both states practicing under the NLC would increase the amount of coverage her company can provide patients in multiple counties on both sides of the river. She said this will also help advance telemedicine locally, as well.

“It’s truly a win for everyone,” she said.

Wendy Dant Chesser, president and CEO of 1si, agreed with Cooper, saying Indiana’s participation in the NLC would be a victory for the region on multiple fronts.

“In the last several years, we have seen ownership changes of three major hospitals in Southern Indiana. Floyd Memorial was acquired by Baptist Health, and both Clark Memorial and Scott Memorial are now owned by a consortium that includes the Norton Hospital network,” she said in an e-mail response.

“Healthcare employers will be able to deploy nursing talent where needed, regardless of which side of the state line their facilities are located. This helps to assure area residents will have nurses when and where they are needed.” Additionally, she said, “Nurses will have more flexibility for short- or long-term assignments without the expense and frustration of onerous licensing processes.”

Dant Chesser believes this initiative was so important for the Southern Indiana community that she went to Indianapolis last summer — along with Dr. Dan Eichenberger of Baptist Health Floyd — to testify when the compact was the subject of the legislative study committee.

“As a business association, we have members who are seeking better ways to serve their customers. This is our way to support them,” Dant Chesser said.

“But we also recognize Clark, Floyd and Scott counties are tied to the regional economy of the Louisville Metropolitan Statistical Area, and we support ways for businesses to grow and serve within this regional framework.”



Wendy and Matt appear on Inside Indiana Business with Gerry Dick



Wendy attends the signing of the Nurse License Compact

Southern Indiana RDA Submits Regional Plan

Inside Indiana Business; Wednesday, September 11th 2019, 6:44 PM EDT

Updated:

Thursday, September 12th 2019, 9:20 AM EDT

By Alex Brown, Assistant Managing Editor



Wendy Dant Chesser is the president and CEO of One Southern Indiana. (Inside INdiana Business Photo)

NEW ALBANY - Officials in Southern Indiana say work on a long-awaited regional plan is complete. The board of directors for the Our Southern Indiana Regional Development Authority has submitted its final report to the Indiana Economic Development Corp. after more than nine months of engagement with residents and stakeholders in the five-county region. The plan is the result of a \$150,000 planning grant awarded by the IEDC last year.

The RDA is administered by One Southern Indiana, which is the chamber of commerce and economic development agency for Clark and Floyd counties. In an interview with Inside INdiana Business, 1si President and Chief Executive Officer Wendy Dant Chesser said the engagement process aimed to build consensus in the region.

"We were excited to learn that there were a lot of things going on that we could play a supportive role in; we don't have to take the lead in it. There are many other projects where we have a partner role that we could play as the regional development authority," said Chesser. "But there were three or four areas in which the Our Southern Indiana RDA can take a lead and that is things such as regional broadband solutions. We also know that regional marketing and branding is something that no one's taken responsibility for, so a regional development authority can look at those type of projects to really partner with many of the different organizations that are working in the five counties to build a better brand for our community and for our region."

The RDA says final submission plan identified seven specific priorities for the region, such as:

- **Connections:** Enhance connections throughout the local communities, counties, and broader region by improving safety, function, and efficiencies for all modes of transportation including vehicular, bicycle, pedestrian, rail, intermodal, freight, and aviation networks.
- **Destinations:** Create and nurture great destinations for present and future residents and visitors.
- **Economic Development:** Pursue catalytic development that spurs investment in the region's jobs, housing, public spaces, and infrastructure.
- **Government:** Encourage collaboration among organizations, agencies, and local government.

- **Infrastructure:** Ensure that the region's utility infrastructure systems respect and protect the area's natural resources while providing high-quality, efficient, and effective services to current and future residents and businesses.
- **Natural Assets:** Promote the preservation and celebration of the region's unique natural features and environmentally-sensitive areas.
- **Workforce:** Align education and workforce development opportunities to strengthen job growth and ensure that the region's workforce adequately fulfills the employment opportunities available within the region.

The plan still requires approval by the IEDC. Chesser says the group has been in communication with the IEDC during the planning process to make sure they were in line with what was expected, but also to make sure they were making the plan their own.

"We wanted to make the plan our own so the counties of Clark, Floyd, Jefferson, Scott and Washington can now look at what it is that we need and how we can work with IEDC to start building relationships to build towards further projects."

Chesser says the RDA is now in the process of developing its next steps upon approval from the IEDC. Chesser said the engagement process aimed to build a consensus around what the region needs to compete for talent and economic development opportunities.

From: Wendy Dant Chesser
Sent: Thursday, September 5, 2019 1:49 PM
To: mgreen@wdrb.com
Subject: 1si letter



Submitted via the Sherman Minton Renewal website:

July 16, 2019

Mr. Joe McGuinness, Commissioner
Indiana Department of Transportation
100 N. Senate Ave., IGCN 755
Indianapolis, IN 46204

Re: Support of Maintaining Access During Sherman Minton Renewal Project

Dear Commissioner McGuinness,

Thank you for your interest in public comments concerning the Sherman Minton Renewal project. I am writing to urge the Indiana Department of Transportation (INDOT) to recognize the negative effects on community businesses if the Sherman Minton Bridge were to be completely closed during this renewal project.

One Southern Indiana (1si) is an 1,100-member business organization that operates as both the chamber of commerce and economic development organization for Clark and Floyd counties in Southern Indiana. 1si proactively works to grow our regional economy through business attraction, retention and expansion; through encouraging and supporting entrepreneurs and workforce development; and through providing government and workforce advocacy, business education, networking opportunities and other business services to our members and investors.

We have followed the work of the INDOT team with great interest as part of the Community Advisory Committee. Notably, we appreciate the time and attention given to our concerns by Ron Heustis, project manager, and the entire team of INDOT employees and contractors. We certainly understand and support INDOT's first and foremost priority of ensuring public safety in the design and construction of the renewal project.

Additionally, 1si understands the need for the maintenance project. Adding new life to a 56-year-old bridge is vitally important to the economic well-being of our region. However, ***as long as public safety can be ensured consistent with overall fiscal responsibility, we strongly support maintaining access to the Sherman Minton Bridge for vehicular crossings during the entirety of the project.***

We have gathered the following information from businesses and community members on the anticipated effects of the project to be included in the public record. As you will see, the Sherman Minton Bridge is an economic lifeline for many of our businesses, their employees and their customers. A full closure will have an immensely negative effect on these businesses and their customers and employees.

- Horseshoe Casino, Elizabeth, Ind. – The location of this complex just west of Floyd County along the Ohio River requires most of the employee and customer traffic from southern and eastern population centers (Metro Louisville) use the Sherman Minton Bridge:

- *Effects on Workforce:* Horseshoe has 1,300 team members, and about 400 of them (31%) use the bridge to get to/from work. Effects of using alternate bridges are significant when calculating tolled alternatives, mileage increases and additional time.
- *Effects on Business:* When the Sherman Minton was closed for six months beginning September 2011, Horseshoe saw a 15% decline in business.
- *Effects on State of Indiana Revenue:* Not only did this loss in gaming revenue affect the company, but the loss also affected the State of Indiana. Horseshoe's tax payments to the State saw a decrease of approximately \$15 million for this time period.
- Baptist Floyd Hospital, New Albany, Ind. – This major hospital with 236 beds serves as the primary medical facility for Floyd County with more than 2,000 physicians and associates. Care services at Baptist Floyd include heart, cancer, mother and baby, neuro and stroke, orthopedic and urgent services. In an employee survey of 600 associates, Baptist Floyd found 504 respondents and/or their families utilized the Sherman Minton Bridge to get to work or for other routine purposes. Additionally, these respondents reported weekly crossings averaging 2.3 passengers per vehicle.
- Samtec, Inc., New Albany, Ind. – Based in the New Albany Industrial Park along Grant Line Road near I-265, Samtec is a locally-owned worldwide manufacturer of computer components, including board level interconnects. With approximately 1,800* employees producing products from this headquarters location, the Sherman Minton Bridge is vital to the company's associates as well as shipping partners. Samtec estimates that 20% of its associates utilize the bridge on a daily basis, and all shipments of products to customers are routed across the Sherman Minton through Louisville via common carriers, including UPS Worldport, Fed Ex Louisville Airport and DHL Louisville Hub.
- Ford Motor Company, Louisville, Ky. – Ford Motor Company has two major facilities in the Louisville Metro area, and both draw employees from Southern Indiana. Those resident employees in western Floyd, Harrison and other counties along I-64 in Indiana utilize the Sherman Minton bridge to get to work. Approximately 860 employees cross this bridge as part of their daily commute. Additionally, Ford estimates approximately 60 semitrailers use the Sherman Minton bridge daily to deliver parts to the two Louisville facilities.
- Rodefer Moss & Co, PLLC, New Albany & Corydon, Ind. – Not only are large businesses bracing for impact, but smaller companies are concerned, as well. Rodefer Moss provides certified public accounting and business advisory services. In both the downtown New Albany location in Floyd County and the downtown Corydon location in Harrison County, approximately 30% of the 65 employees utilize the Sherman Minton daily, with 176 bridge crossings weekly.
- Indiana University Southeast, New Albany, IN – The main campus of Indiana University Southeast, located along Grant Line Road, conducted a transportation survey in 2014 to better assess the commuting patterns of its students, staff and faculty. The survey found 58.5% of the 1,115 respondents use one of the regional bridges to get to and from Indiana University Southeast, and 43.1% (or 481 individuals) utilize the Sherman Minton Bridge.
- Ivy Tech Community College, Sellersburg, Ind. – The campus location near the intersection of I-65 and I-265 can be best accessed from the southwest via the Sherman Minton Bridge. After surveying students and faculty, it appears there are approximately 900 trips by 100+ individuals who would be impacted on a weekly basis.

As our region's chamber and economic development organization we are committed to providing growth strategies and resources for our community partners. For our part, we intend to help our business members, service providers and communities better prepare for this disruption to our regional transportation routines. These suggestions include tips for minimizing travel across the Sherman Minton bridge, more flexible work schedules for employees, encouraging carpooling, toll reimbursements for alternative routes, etc.

We recognize the renewal project – however constructed – will have a negative economic effect on our businesses and services to regional residents. But with these examples in mind, and with safety as our shared top priority, we urge INDOT to **maintain access to the Sherman Minton Bridge for vehicular crossings during the entirety of the project.**

Sincerely,

Bryan Wickens
Chair, 1si Advocacy Council

Wendy Dant Chesser
President & CEO

cc: Mr. Ron Heustis, PE, Project Manager, INDOT
The Hon. Chris Garten, State Senator, District 45
The Hon. Ron Grooms, State Senator, District 46
The Hon. Erin Houchin, State Senator, District 47
The Hon. Terry Goodin, State Representative, District 66
The Hon. Karen Engleman, State Representative, District 70
The Hon. Rita Fleming, State Representative, District 71
The Hon. Ed Clere, State Representative, District 72
The Hon. Steve Davisson, State Representative, District 73
Mr. Chad Carlton and Ms. Mindy Peterson, C2 Strategic Communications

* Source: *2018-19 Book of Lists*, published by Louisville's Business First

Hate crimes legislation on governor's agenda for upcoming legislative session

By JASON THOMAS News and Tribune, Nov 8, 2018



Gov. Eric Holcomb participated in a question-and-answer session with One Southern Indiana's Wendy Dant Chesser on Thursday as part of 1si's Governor's Luncheon Event at the Radisson Louisville North Hotel.

TAFF PHOTO BY TYLER STEWART

CLARKSVILLE — Amid a wide-ranging question-and-answer session with economic leaders in Southern Indiana on Thursday, Gov. Eric Holcomb revealed that hate crimes legislation will be on his legislative agenda come January. Holcomb made the announcement at One Southern Indiana's Governor's Luncheon event, also mentioning that he'll roll out his agenda the first week of December ahead of the General Assembly convening Jan. 14 in Indianapolis.

Holcomb called the issue, also referred to as bias crimes, "critically important," and that the topic regularly comes up during economic development-related conversations.

Indiana is one of five states that does not have a hate crimes law.

"To be on a list of five, and not on a list of 46, could make a difference," Holcomb said to more than 150 Southern Indiana stakeholders at the Radisson Louisville North Hotel. "By the way, it's just the right thing to do. It's the founding principles of our country, equality and how we treat one another, that were expressed in our founding documents and philosophy."

Wendy Dant Chesser, president and CEO of 1si, said the organization supports an increase in the enhancement of hate crimes penalties and 1si's advocacy council will recommend to the board of directors to approve support of that position.

Hate crimes legislation was brought up in the last legislative session but no action was taken, and Holcomb said he's overdue to be a part of the solution.

"I was supportive last session but didn't weigh in much," he said. "We need to get this done. It's not about criminalizing thought, it's about actions that occur and holding folks accountable, and standing with victims so they know, and everyone else knows, we'll be standing with them."

Not surprisingly Holcomb touched on several workplace and economic development-related issues in a 30-minute question-and-answer session with Dant Chesser.

From a broad perspective "where we're threatened is population scarcity and skill of our workforce," Holcomb said.

Topics at the luncheon included the next iteration of the Regional Cities initiative and how to fund it, a holistic approach toward job creation involving businesses, communities and schools, increasing broadband internet access and tackling the opioid epidemic.

When it comes to dealing with the opioid crisis, Holcomb called Clark County a "model" community, citing its proactive approach in addressing prevention, treatment and enforcement, and for bringing key stakeholders together to work on solutions.

Among topics specific to Southern Indiana, in addition to the opioid crisis, Holcomb talked about economic drivers, such as the Regional Cities program and the federal Opportunity Zones grant program.

Southern Indiana missed out on a chunk of \$42 million in the inaugural Regional Cities program in 2015, when cash was doled out from the state's tax amnesty program to different regions for specific economic development projects. Local leaders are more involved with the latest go-round, having created a Regional Development Authority.

The Regional Cities Initiative isn't giving out money to RDAs this year, but it could start again in 2019; however, funding from the tax amnesty program will not likely be the source.

"I'm a huge fan of regional cities," Holcomb said. "It is the way of the future. It is how to complement and not compete, or cannibalize, one another's interest. The sum of the parts is truly greater than each individual piece." Five areas in Clark and Floyd counties have been designated Opportunity Zones, which is based on census tracts, and that provides tax incentives to attract private sector investment to low-income urban and rural communities. "I have huge, high hopes," Holcomb said, noting that there are 83 cities in Indiana involved in the program. "This could be one of those answers missing for so, so long for all those communities that applied."

Another workforce-related priority for the governor is the Next Level Jobs program, which has created a website that paints a broad picture of Indiana's workplace challenges and achievements. For instance, analysts can see how many people are incarcerated, or how many people have enrolled in college, or the status of Work One programs.

"The bottom line is how do you get the business community, the state and the schools to be sitting here working all together?" Holcomb said. "If we want a different result, we're going to have to do some things differently."

What are the advocacy priorities for the Chamber?

The role of One Southern Indiana (1si) in promoting a fiscally stable, business-friendly environment is deeply impacted by local, regional, state and national issues. Through our Advocacy Council's initiatives, we promote positive change by serving as the "Champions of Ideas" to achieve economic and business vitality for the region. The Advocacy Council is comprised of approximately 20 members who meet regularly to discuss a range of issues, suggest to members of the Board of Directors the steps or courses of action the Board may wish to take on some issues and produce an annual Advocacy Agenda.

The Advocacy Council identifies ideas to champion through the development of the Advocacy Agenda. For the last few years, this agenda has focused on five major issue areas, including: Career-Ready Workforce and Educational Initiatives, Infrastructure and Transportation, Business-Friendly Initiatives to Increase Indiana's Competitiveness, Regional Initiatives and Civic Engagement. Each issue area has several priority areas, or sub-issues, under it.

Our commitment to Championing Ideas help us achieve significant success in two areas of our agenda:

- 1si's advocacy on behalf of the nurse-licensure compact, within the Career-Ready Workforce and Educational Initiatives issue area, presents an excellent, recent example of a concept or idea – to enable registered nurses to apply for and receive multi-state licenses to practice in another state, which would ease staffing challenges at Southern Indiana hospitals and medical offices that compete with facilities in Louisville, Kentucky – that was initially discussed amongst Advocacy Council members and then adopted by the Board of Directors.

1si members and staff discussed the issue extensively with Rep. Ed Clere and other members of the state General Assembly and assisted in shaping the subsequent legislation as it was drafted and discussed at the Statehouse. 1si remained committed to the issue through several setbacks, with the reward coming when the bill ultimately was adopted and signed into law by Governor Eric Holcomb. The 1si team remains happy to know the outcome or result of an idea that germinated during a 1si Advocacy Council meeting is a new state law that has the potential to benefit many nurses and their employers in Southern Indiana and throughout the Hoosier State.

- Our efforts to preserve economic development tools solicited our support for our most significant growth area. We worked with Senator Chris Garten to support his bill to extend the Urban Enterprise Zone located within in the River Ridge Commerce Center for an additional 10 years.

Additionally, we strive to provide our members with programs throughout the year that give them opportunities to speak with policy makers at all levels of government through lunches, meetings and other events. Notable events include a lunch and conversation, moderated by 1si President and CEO Wendy Dant Chesser, with Governor Holcomb that was extremely well-received near the end of 2018, as well as an annual 5 O'Clock Network reception where a dozen or more local elected officials gather along with our members to meet and exchange concerns.

Finally, the Board of Directors recently approved changing the structure of the Advocacy Council to enhance 1si's ability to engage and influence decision-makers within all levels of government and at the Statehouse, in particular. Creating industry task forces consisting of additional 1si members, as well as professional lobbyists already representing 1si members before state legislators and regulatory officials, is expected to bolster the organization's effectiveness. This will be especially true when fast-moving issues during the annual legislative sessions make it more difficult for 1si leaders in Southern Indiana to move as quickly as events warrant. The coronavirus situation this spring has delayed the implementation of the new structure, but the transition to the new model is expected to occur in the coming months.

Please see package folder for examples of 1si
Marketing and Communication to Members.

What was the Chamber's strategy for recruiting and retaining members in its last fiscal year?

As with all chambers, **Personal Interaction** is key. The personal relationship between our members and staff is a focus that is tracked and measured. Business Resource and economic development staff meet regularly with members to encourage engagement. For one-week last year, 1si staff teams of two met with the owners of 43 manufacturing facilities during a Metro Manufacturing Alliance "MMA Blitz." In addition, staff recorded five touches annually with each of 84 investors, not including the investor only events held quarterly.

However, 1si also focuses on our classic-level members and their needs. For example, President and CEO Wendy Dant Chesser holds monthly 12-at-12 lunch meetings and invited members at all levels to meet and discuss any topic they chose. An average of 20 participants attended these meetings. In addition, 1si regularly surveys their members to ensure member priorities remain at the top of the work schedule. Ambassadors call members 90-days before member renewal date to check in on the business, ensure that any concerns are addressed, and all database information was correct. The co-directors of first impressions also made 30- and 60-day reminder calls to members in jeopardy of dropping, in addition to mailed and emailed invoices.

All chamber of commerce offer "**Member-Only Benefits.**" Typical programs include member-only discount programs to Office Depot and other member benefits, directory listings, small business promotion, etc. 1si does all that. However, in the past several years, 1si has focused on member-only programs that have a real opportunity to boost a member's bottom line.

In 2018, One Southern Indiana was the first Indiana chamber to launch an insurance program under the new state guidelines. The Insurance Under ONE program not only covers members based in Clark and Floyd Counties, but we have also partnered with the chambers of commerce for Harrison and Scott counties, so that their members may take advantage of this substantial healthcare savings program by maintaining their membership in their home chamber and becoming an "associate" member of 1si at a 60 percent discounted rate.

In addition, 1si has reached out to the SBA in order to become a certified SBA lender for the State of Indiana. Currently, the 26 most southern counties in Indiana have no SBA micro-lending program, and therefore we are determined to meet the need of our underserved small businesses.

Finally, 1si provides **results-oriented programming** including our Leads and Networking groups, discussed elsewhere in this application as well as low-cost educational opportunities.

For example, in an effort to help our members move their most promising front-line employees into management positions, 1si began offering "Leadership from Within," based on the One Minute Manager by Dr. Ken Blanchard and Dr. Spencer Johnson. This four-part program is available to members at a cost of \$300. An organization in Louisville offered a similar program in a one-day setting for \$800.

We also offer quarterly professional development series for sales and marketing professionals, more than ten roundtables for professionals to discuss best practices and quarterly educational sessions on relevant topics including Active-Shooter scenarios, Coping with the Opioid Crisis, Harassment in the Workplace and Workforce Development. These workshops free either free for members or were extremely affordable, costing less than \$30 for members.

Member retention levels at One Southern Indiana regularly remain above the national average. Surprisingly, retention has not dropped since the COVID-19 crisis began, and the average retention rate for the past four months (February – May 2020) is 90.065%.

How has the Chamber used volunteers, incentives or goals to assist in membership development?

One Southern Indiana has been able to bolster membership development in a variety of ways. In the year ending June 30, 2019, new member revenue increased by 11.45 percent, 6.45 above the goal for the year. 1si not only focuses on gaining new members through innovative programming, but just as importantly, moving members from the classic level of membership to upper tiers of membership, which afford more benefits for the member and more revenue for the organization.

In addition, 1si employs a volunteer committee of board members whose sole purpose is to recommend new members and investors. Many times, discounts are given to larger investors on premier event sponsorships. However, 1si does not typically give a discount on membership as it is the backbone of our organizational sustainability.

Our Industry specific leads groups have also been successful in garnering new members who are solely interested in participating in those group activities. The 1si Commercial Property and Residential Services Networking Groups added 40 New Members during the year ending June 30, 2019. and the Health and Life Services Networking Group added 10 new members, over the same year.

One of the larger incentives offered to members is our Insurance Under ONE program which provides benefits to member employers of two or more. The insurance program offers members narrow network packages at large group prices, which depending on the employer can be a substantial discount. This program has garnered eight new members in the past year.

Volunteers are also called upon to act as subject matter experts for our educational programs and our 1si Cares "Ask the Experts" series on Facebook Live. Since the beginning of the COVID-19 crisis, 43 members have been featured as experts in their field in our Facebook Live events. This allows these members the opportunity to showcase their knowledge and business. Most of these sessions are free to the public and highlights the advantages of being a 1si member who can appear as an "expert."

One Southern Indiana also holds two awards events – the ONE Awards and the ACE Awards. The ONE Awards highlight our best business members. More than 100 businesses have been recognized in the 30 years since the event began. The ACE awards has honored 48 individuals in the categories of Community Leader, Professional of the Year and Young Professional of the Year.

Members also receive advertising opportunities through the website, the One Weekly newsletter, various publications, and our twice-monthly Member to Member E-Blasts. During the COVID_19 crisis, 1si discounted advertising in both the One Weekly newsletter. Where we typically sold forty ads annually, 1si sold 31 ads in three months and experienced a 71% increase in number of ads sold over the previous six months.

Like many chambers of commerce, 1si engages members by calling on them to participate as Ambassadors, a program consisting of nearly 35 volunteers who serve as the friendly faces that welcome our members at signature events and networking programs. Ambassadors assist not only in recruiting and welcoming new members to the 1si family, but also making phone calls to check-in and answering questions about the value 1si is bringing to their business.

What new or innovative services have the Chamber created to attract, retain, or serve members?

Member engagement today is not the same as it was in the past, or even six months ago. To provide value to members in unprecedented economic times, 1si moved swiftly to shift from innovative face-to-face activities to much valued virtual services so that members could continue to find our organization relevant and valued.

While most networking groups are either industry-based or specifically non-competitive, 1si has launched a series of **specialized process-specific** networking groups, based around the complete life cycle for business endeavors. Individuals were only allowed to pick one group in which to participate. These groups include:

1si Commercial Property Services Group – 173 Group Members

Member businesses in this group are Construction, Design, Architecture, HVAC, Security, Roofing, Fleet Vehicles, Elevator, Banking, Real Estate, Property Insurance, Communication, GPS Vehicle Tracking, Paving, Cleaning, Site Selection, Moving, Climate Control, Commercial & Industrial Equipment Rentals, Sanitation, Erecting and more!

1si Residential Services Networking Group – 67 Group Members

Member businesses in this group are comprised of; Real Estate Agents, Mortgage Loan companies, Financial Institutions, Home Designers, Inspectors, Insurance, Roofers, Electricians, Furniture & Appliance Stores, Countertop company, Plumbers, Lawn & Landscaping, Real Estate Law Firms, Window, Door companies and more!

The 1si Health & Life Services Group – 159 Group Members

Member businesses in this group include Hospitals, Senior Care, Nursing, Rehab Facilities, both mental and physical, Doctor/Dentist/Veterinary offices, Wellness, Nutrition, Chiropractors, Medical-related businesses, Hospice, Assisted Living Communities, Counseling, Therapeutic, occupational, Behavior Health, Allergy, Health Education, insurance providers and more!

1si also offers more traditional networking groups such as The 1si Nonprofit Roundtable, YP-1si, two CEO roundtables and two leads groups, closed groups of 1si business members who represent a specific business product or service and are assigned a protected SEAT for that industry/product/service. Only one type of business SEAT in each group is permitted. Each closed group generates, and shares business leads for each other. These groups continued to meet via Zoom during the COVID-19 crisis. However, it was determined that a more concerted effort must be made to engage members and ensure 1si remained a value. In response, the organization launched 1si Cares!

This initiative is a three-pronged approach to assist businesses navigate the current health crisis. All aspects of 1si Cares! can be found on the 1si website at www.1si.org/covid-19 or www.1si.org/soin-reset. In addition, the site will provide the latest announcements from the federal, state and local governments as it relates to business and a variety of crisis materials submitted by 1si members for other to look over and adopt to their unique business circumstances. All resources were free and available to members and the public at large.

The first prong, **1si Connects**, is an online effort to provide businesses with the resources needed to continue business during this interruption to normalcy. This was done through surveys where staff matched business in need to businesses who could provide needed services. It also included providing regional resources for much needed PPE such as hand sanitizer, face masks and cleaning products. In addition, created new icon for members in the online directory to identify businesses who were open and/or offering special services/discounts during the pandemic. Users of these services were able to advertise their restaurants, cleaning services and other more traditional member services. This effort is ongoing.

1si Collaborates is the second prong. Team members from 1si worked with local municipalities, county government and local foundations to raise \$1.2 million and created a fund to provide direct relief assistance for businesses. At the time of this application, approximately two months after 1si Collaborates began, we are proud to report 123 loans totaling assistance in the amount of \$1,243,600 has been directly awarded to Clark and Floyd County businesses in need.

The final prong is **1si Calls**. 1si begun hosting daily Facebook Live Events to let businesses “Ask an Expert”. These real-time conversations allow participants to receive relevant information on a host of topics including marketing and sales during a pandemic, SBA government assistance for businesses affected by the pandemic and tips to manage employees during a time of crisis. At the time of this application, videos posted to the 1si Facebook have been watched more than 18,400 times, an increase of 1980%. The time the viewers spent watching our videos was 353 hours, an increase of 5157%.