



EHLERS
LEADERS IN PUBLIC FINANCE

June 11, 2018

Proposal to Provide TIF Assistance and Economic/Community Development Consulting Services to the City of Manitowoc, Wisconsin

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Appendix A: Resumes



June 11, 2018

Nicolas Sparacio, Community Development Director
City of Manitowoc
900 Quay Street
Manitowoc, MN 55320

Re: Proposal to Provide TIF Assistance and Economic Development Consulting Services to the City of Manitowoc, Wisconsin

Dear Nic:

On behalf of Ehlers, we are pleased to present this proposal to provide economic development consulting services to the City of Manitowoc. We hope this proposal demonstrates our team's collective qualifications to deliver the City's full scope of services – and to surpass your expectations for quality and value. We believe the following distinguishes Ehlers from our competitors:

Expertise. In the last four years, Ehlers has provided community development and economic development services to over 100 communities in Wisconsin. We work smart and fast, efficiently delivering high quality services to our clients.

Wisconsin Roots. Ehlers opened a Wisconsin office in 2065, and we have deep roots here. At Ehlers, all employees have ownership through an employee stock ownership trust. As an employee-owned firm, we are all incented to provide the best possible service to our clients and to focus on your long-term success, not solely on short-term profit. We will bring our breadth and depth of experience to the City of Manitowoc to ensure that you meet the planning and development goals of your community.

Independent Approach. We have long held to the fiduciary standard of an independent financial advisor: we will represent the best interests of the City of Manitowoc. Importantly, we do not represent developers or the private sector. It is our goal to thoroughly explain all options to you before any decisions are made.

We appreciate your consideration of our economic development consultant services proposal and look forward to discussing how Ehlers can best serve the City of Manitowoc.

Respectfully submitted,

Philip Cosson
Senior Municipal Advisor

Dawn Gunderson
Senior Municipal Advisor

Section A: Company Background

History of the Firm

Ehlers is a trusted advisor for more than 350 local units of government in Wisconsin who work every day to make prudent decisions regarding public resources. We exclusively represent the interests of municipalities; Ehlers will not work for developers or the private sector. This approach, along with our work with smaller communities and regional centers, has helped Ehlers grow to be ranked as one of the top advisory firms nationally.

Key Staff and Their Specialties

Most of our municipal advisors have served as public officials or staff in local government in Wisconsin. The average tenure of our employees is 15 years, and together we have more than 370 years of experience in public finance and economic development. Ehlers is comprised of six different teams, each with a respective principal. The City of Manitowoc will be led by Municipal Advisors Philip Cosson and Dawn Gunderson and supported by Paula Czaplewski. Phil joined Ehlers in 1996 after serving as an Economic Development Specialist at Southeast Wisconsin Regional Planning Commission. Dawn joined Ehlers in 2004 after service as the Finance Director for the City of Muskego, WI. Professional qualifications can be found in Section B. Please see Appendix A for full resumes.

Support Personnel

The City of Manitowoc will have access to the entire staff and team of Municipal Advisors who will be pulled in on an as-needed basis. In particular, the City will be supported by TIF Coordinator Paula Czaplewski. Paula has facilitated the establishment and modification of approximately 600+ tax increment financing districts during her time at Ehlers. Paula's contribution to the Manitowoc team will include the preparation of Council, Planning Commission documents and resolutions, coordination of timetable and schedules with the members of the joint review board, preparing correspondence and reports, day-to-day activities, and fielding inquiries from the Manitowoc staff and overlapping taxing entities.

Office Organization and Support Capabilities

A review of Ehlers' support capabilities can be found in the "Support Personnel" and "Research Capabilities" sections of the proposal.

Office Locations

Ehlers' corporate offices are located in Roseville, Minnesota. Other office locations include Denver, Colorado; Chicago, Illinois; and the metro area of Milwaukee, Wisconsin. The City of Manitowoc will be served by our Pewaukee, Wisconsin office.

Research Capabilities

Ehlers is committed to identifying and implementing technological innovations that hold clear potential for improving the quality, timeliness, and cost-effectiveness of our service.

Ehlers computers are equipped with the latest version of the Microsoft Office Suite. We often collaborate with clients using this software. Ehlers also has special software allowing municipal advisors and clients to send large files that are incapable of being sent via email. We use Lync for shared on-line meetings. We do not have GIS mapping software and would need to rely on the City and/or county for GIS services.

Our website provides you with information on Ehlers staff and current projects, newsletters, market rates, and best practices in local government finance. Only Ehlers clients are granted access to the Resource Library on our website for additional information.

Insurance Claims/Ethics Complaints

There are currently no insurance claims or ethics complaints pending nor has Ehlers received any in the past five years.

Section B: Consultant Qualifications

Ehlers will bring a wealth of experience in economic development to the City of Manitowoc with the proposed team of Phil Cosson and Dawn Gunderson. They are dedicated to assisting local governments meet their planning and community development objectives. Several successful projects led by the City of Manitowoc team are highlighted here. Full resumes of the Municipal Advisors can be found in Appendix A.



Phil Cosson, Senior Municipal Advisor

Phil has been with Ehlers since 1996, serving as a Senior Municipal Advisor/Director to municipalities, public utilities and special districts including housing and redevelopment authorities, and community development authorities. He has been actively involved in economic development and public finance since 1989. Phil's areas of expertise are tax increment financing, debt planning and issuance, capital improvement plan development and budgeting, economic development financing programs, preparation of development agreements and long range financial management plans.

Preparatory Education: Masters Degree in City Planning from Georgia Institute of Technology, Atlanta, Georgia and a Bachelor of Science in Geography from the University of Wisconsin - Milwaukee. Mr. Cosson is a member of the National Development Council - Economic Development Finance Professional. He has been certified as a Certified Independent Public Municipal Advisor by the National Association of Municipal Advisors.



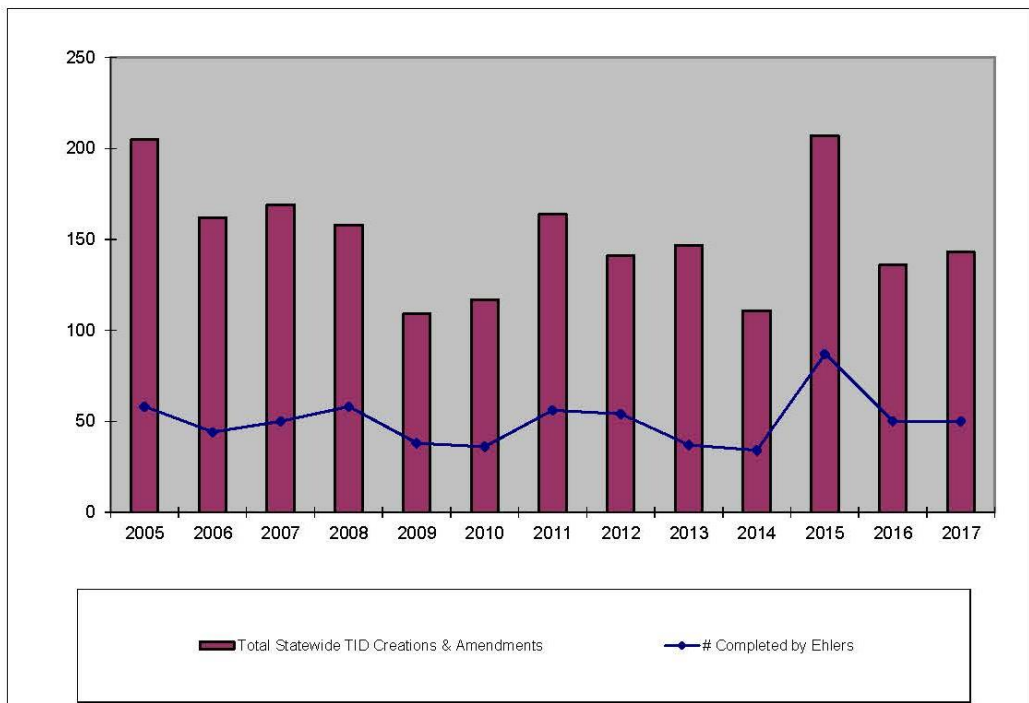
Dawn Gunderson, Senior Municipal Advisor

Dawn joined Ehlers in 2004, serving as a Senior Municipal Advisor to Wisconsin cities, villages, towns and counties. She brings 25 years of local government finance experience to Ehlers' clients from her employment in City, County and State government. Dawn's areas of expertise are debt planning and issuance, the development of long range operating and capital plans, tax increment financing, community development authorities and public utilities. Her strong background in local government finance brings to Ehlers an understanding from our client's perspective.

As a long-time active member of the Government Finance Officers Association, Dawn was one of the first in the country to receive the designation of Certified Public Finance Officer by the International Government Finance Officers Association. Her firsthand experience in the unique and complex financial issues facing municipal government today was gained through her experience in local government. In addition to the many financial advisory projects Dawn has been involved with while at Ehlers, she has also assisted communities in the creation and amendment of numerous TIF Districts including Developer pro forma review. Dawn has attained the designation of Certified Independent Public Municipal Advisor by the National Association of Municipal Advisors.

Section C: Ehlers Market Share (Tax Increment Financing)

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Total Statewide TID Creations & Amendments	205	162	169	158	109	117	164	141	147	111	207	136	143
# Completed by Ehlers	58	44	50	58	38	36	56	54	37	34	87	50	50
Percentage	28.29%	27.16%	29.59%	36.71%	34.86%	30.77%	34.15%	38.30%	25.17%	30.63%	42.03%	36.76%	34.97%



Section D: Client References

City of Marinette

Attorney Jonathan Sbar

715.732.5149

jsbar@marinette.wi.us

City of Sheboygan

Chad Pelishek, Economic Development

Manager

920.459.3383

Chad.Pelishek@sheboyganwi.gov

City of Plymouth

Brian Yerges, City Administrator/Utilities

Manager

920.893.1271

byerges@plymouthgov.com

Village of Little Chute

James Moes, Community Development

Director

920.423.3870

jim@littlechutewi.org

City of Mequon

Kim Tollefson, Director of Community

Development

262.236.2902

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City of Greenfield

Kristi Johnson, Community Development

Manager

414.329.5342

Kristi.johnson@greenfieldwi.us

Section E: Ehlers' View & Project Pricing

Ehlers has always believed in the virtue of community life, and understands that community is created, in part, through attractive public spaces, a vibrant mix of housing options, a solid base of employment, and thriving commercial districts. Toward this end, we provide seasoned advice to local governments who want to develop or redevelop. Ehlers has a 12-person team dedicated to assisting local governments meet their economic development and redevelopment objectives in Wisconsin. The majority of team members has worked for local, county or State government and understands development goals from your perspective, that of staff and policymakers.

Our team views ourselves as an extension of staff, responsible to City Staff and Council for delivering high quality planning and community development services to the City of Manitowoc.

We have outlined below each of the tasks in the RFP's Scope of Services and provided our proposed fee.

Project 1: TID 12 Boundary Amendment

Boundary amendment to subtract property from a distressed district in the I-43 Tech Park. The subtracted parcels will be included in the proposed TID 21

Services Needed:

- Review the work completed to date to ensure compliance
- Attend the final JRB meeting to support City staff at 2:00 on June 26, 2018
- Compile and submit the TID boundary amendment package to DOR

Proposed Fee: Flat fee of \$3,000

Project 2: TID 19 Boundary Amendment

Boundary amendment to newly created industrial district to bring in additional property from a previously closed distressed district 11

Services Needed:

- Attend and facilitate all meetings of the JRB, Plan Commission, and Common Council Finance Committee
- Provide all the timelines, draft public notices, draft JRB letters draft meeting agendas, draft resolutions, document revisions, boundary descriptions, and work with the City to obtain the necessary mapping to complete the amendment.
- Compile and submit the TID boundary amendment package to DOR

Proposed Fee: Flat fee of \$15,000 (assumption that this amendment will be done on the same timeline as Project 5, which will provide a discount fee the second amendment)

Project 3: TID 21 District Creation

Creation of a new industrial district to cover much of the I-43 Tech Park. It will overlay 2 districts that will likely close next year and it will depend upon Distressed TID 12 being successfully amended to avoid any overlap there.

Services Needed:

- Review the work completed to date to ensure compliance
- Attend the final JRB meeting to support City staff at 2:00 on June 26, 2018
- Compile and submit the TID creation package to DOR

Proposed Fee: Flat fee of \$3,000

Project 4: TID 22 District Creation

Creation of a new TIF district to cover an area east of I-43 north and south of Calumet Avenue including the site of a future Meijer store, a future small to mid-box retail area, and the future corporate headquarters of Investor Community Bank.

Services Needed:

- Attend and facilitate all meetings of the JRB, Plan Commission, and Common Council Finance Committee
- Provide all the timelines, draft public notices, draft JRB letters draft meeting agendas, draft resolutions, document revisions, boundary descriptions, and work with City to obtain the necessary mapping to complete the creation.
- Compile and submit the TID creation package to DOR

Proposed Fee: Flat fee of \$15,000

Project 5: TID 15 to 14 Allocation Amendment

TID 15 has excess funds and TID 14 is a downtown area district that is not projected to recover all costs prior to its closure. An allocation amendment from TID 15 to TID 14 is needed to improve financial performance and move both districts toward closure

Services Needed:

- Attend and facilitate all meetings of the JRB, Plan Commission, and Common Council Finance Committee
- Provide all the timelines, draft public notices, draft JRB letters draft meeting agendas, draft resolutions, document revisions, boundary descriptions, and work with the City to obtain the necessary mapping to complete the amendment.
- Compile and submit the TID boundary amendment package to DOR

Proposed Fee: Flat fee of \$9,000 (assumption that this amendment will be done on the same timeline as Project 3, which allows for a discount fee for this second amendment)

Project 6: Various Development Agreements

Potential projects that would be advancing to a term sheets and development agreements within 2018.

Services Needed:

- Consultation with staff on terms, assistance with negotiation and communications with companies/developers
- Assist in drafting term sheets
- Review and comment on the financial and security provisions sections of a development agreement that has appropriate legal review

Proposed Fee: Hourly rates for Phil and Dawn will be charged at the Senior Municipal Advisory amount and hourly rates for Paula Czaplewski will be charged at the TIF Coordinator rate as shown below:

Classification	Hourly Rate
Senior Municipal Advisor	\$ 250
Tax Increment Financing Coordinator	\$ 150

Project 7: General Consultation

Ongoing assistance to staff addressing specific questions for providing general TIF advice

Services Needed:

- Occasional communications (phone and email), review of questions and issues, and assistance with DOR, as needed will be no charge.
- Attendance at meetings and/or project review and analysis for specific projects will be charged at the hourly rates as shown above.

Section F: Sample Scope of Services for Tax Incremental Financing Services

Tax Incremental Financing Services

Sample Scope of Service

Client has requested that Ehlers assist Client with _____ (“Project”). Ehlers proposes and agrees to provide the following scope of services:

Phase I – Feasibility Analysis

The purpose of Phase I is to determine whether the Project is a statutorily and economically feasible option to achieve the Client’s objectives. This phase begins upon your authorization of this engagement, and ends on completion and delivery of a feasibility analysis report. As part of Phase I services, Ehlers will:

- Consult with appropriate Client officials to identify the Client’s objectives for the Project.
- Provide feedback as to the appropriateness of using Tax Incremental Financing in the context of the “but for” test.
- If the Project includes creation of or addition of territory to a district, identify preliminary boundaries and gather parcel data from Client. Determine compliance with the following statutory requirements as applicable:
 - Equalized Value test.
 - Purpose test (industrial, mixed use, blighted area, in need of rehabilitation or conservation, or environmental remediation).
 - Newly-platted residential land use test.
- Prepare feasibility analysis report. The report will include the following information, as applicable:
 - Identification of the type or types of districts that may be created.
 - A description of the type, maximum life, expenditure period and other features corresponding to the type of district proposed.
 - A summary of the development assumptions used with respect to timing of construction and projected values.
 - Projections of tax increment revenue collections to include annual and cumulative present value calculations.
 - Qualification of the district as a donor or recipient of shared increment, and projected impact of any allocations of shared increment.

- If debt financing is anticipated, a summary of the sizing, structure and timing of proposed debt issues.
 - A cash flow *pro forma* reflecting annual and cumulative district fund balances and projected year of closure.
 - A draft time table for the Project.
 - Identification of how the creation date may affect the district's valuation date, the base value, compliance with the equalized value test, and the ability to capture current year construction values and changes in economic value.
 - When warranted, evaluate and compare options with respect to boundaries, type of district, project costs and development levels.
 - Ehlers will provide guidance on district design within statutory limits to creatively achieve as many of the Client's objectives as possible, and will provide liaison with State Department of Revenue as needed in the technical evaluation of options.
- Present the results of the feasibility analysis to the Client's staff, Plan Commission or governing body.

Phase II – Project Plan Development and Approval

If the Client elects to proceed following completion of the feasibility analysis, the Project will move to Phase II. This phase includes preparation of the Project Plan, and consideration by the Plan Commission¹, governing body, and the Joint Review Board. This phase begins after receiving notification from the Client to proceed, and ends after the Joint Review Board takes action on the Project. As part of Phase II services, Ehlers will:

- Based on the goals and objectives identified in Phase I, prepare a draft Project Plan that includes all statutorily required components.
- We will coordinate with your staff, engineer, planner or other designated party to obtain a map of the proposed boundaries of the district, a map showing existing uses and conditions of real property within the district, and a map showing proposed improvements and uses in the district.
- Submit to the Client an electronic version of the draft Project Plan for initial review and comment.
- Coordinate with Client staff to confirm dates and times for the meetings indicated within the following table. Ehlers will ensure that selected dates meet all statutory timing requirements, and will provide documentation and notices as indicated.

¹ If Client has created a Redevelopment Authority or a Community Development Authority, that body may fulfill the statutory requirements of the Plan Commission related to creation or amendment of the district.

Meeting	Ehlers Responsibility	Client Responsibility
Initial Joint Review Board	<p>Prepare Notice of Meeting and transmit to Client's designated paper.</p> <p>Mail meeting notice, informational materials, and draft Project Plan to overlapping taxing jurisdictions.</p> <p>Provide agenda language to Client.</p> <p>Attend meeting to present draft Project Plan.</p>	<p>Post or publish agenda and provide notification as required by the Wisconsin Open Records Law.</p> <p>Prepare meeting minutes.</p> <p>Designate Client Joint Review Board representative.</p> <p>Identify and recommend Public Joint Review Board representative for appointment.</p>
Plan Commission Public Hearing	<p>Prepare Notice of Public Hearing and transmit to Client's designated paper.</p>	<p>Post or publish agenda and provide notification as required by the Wisconsin Open Records Law.</p>
Plan Commission Public Hearing	<p>For blighted area districts and in need of rehabilitation or conservation districts, provide a format for the required individual property owner notification letters.</p> <p>Attend hearing to present draft Project Plan.</p>	<p>Prepare and mail individual property owner notices (only for districts created as blighted area, or in need of rehabilitation or conservation).</p> <p>Prepare meeting minutes.</p>
Plan Commission	<p>Provide agenda language to Client.</p> <p>Attend meeting to present draft Project Plan.</p> <p>Provide approval resolution for Plan Commission consideration.</p>	<p>Post or publish agenda and provide notification as required by the Wisconsin Open Records Law.</p> <p>Distribute Project Plan & resolution to Plan Commission members in advance of meeting.</p> <p>Prepare meeting minutes.</p>
Governing Body Action	<p>Provide agenda language to Client.</p> <p>Attend meeting to present draft Project Plan.</p> <p>Provide approval resolution for governing body consideration.</p>	<p>Post or publish agenda and provide notification as required by the Wisconsin Open Records Law.</p> <p>Provide Project Plan & resolution to governing body members in advance of meeting.</p> <p>Prepare meeting minutes.</p>
Joint Review Board Action	<p>Mail meeting notice and copy of final Project Plan to overlapping taxing jurisdictions.</p> <p>Prepare Notice of Meeting and transmit to Client's designated paper.</p> <p>Provide agenda language to Client.</p> <p>Attend meeting to present final Project Plan.</p> <p>Provide approval resolution for Joint Review Board consideration.</p>	<p>Post or publish agenda and provide notification as required by the Wisconsin Open Records Law.</p> <p>Prepare meeting minutes.</p>

- Throughout the meeting process, provide drafts of the Project Plan and related documents in sufficient quantity for the Client's staff, Plan Commission, governing body and Joint Review Board members.
- Provide advice and updated analysis on the impact of any changes made to the Project Plan throughout the approval process.

Phase III – State Submittal

This phase includes final review of all file documents, preparation of filing forms, and submission of the base year or amendment packet to the Department of Revenue. This phase begins following approval of the district by the Joint Review Board, and ends with the submission of the base year or amendment packet. As part of Phase III services, Ehlers will:

- Gather documents and information from the City, assemble and submit to the Department of Revenue the required base year or amendment packet, including the final Project Plan document containing all required elements and information.
- Provide the Client with an electronic copy of the final Project Plan (and up to 15 bound hard copies if desired).
- Provide the municipal Clerk with a complete electronic copy transcript of all materials as submitted to the Department of Revenue for certification.
- Act as a liaison between the Client and the Department of Revenue during the certification process in the event any questions or discrepancies arise.

Compensation

In return for the services set forth in the "Scope of Service," Client agrees to compensate Ehlers as follows:

- Discounted pricing is available if all phases of more than one creation or amendment are done concurrently, utilizing same meeting nights. If meetings for simultaneous districts do not occur on the same evening, full fee shall be charged per district.
- In the event Client determines not to proceed with the Project once a Phase has been authorized, but prior to that Phase's completion, the compensation due for that Phase will be prorated to reflect the percentage of the work completed.

For any service directed by Client and not covered by this, or another applicable Appendix, Ehlers will bill Client at an hourly rate that is dependent upon the task/staff required to meet Client request at no less than \$125.00/hour and not to exceed \$250.00/hour.

Payment for Services

For all compensation due to Ehlers, Ehlers will invoice Client for the amount due at the completion

of each Phase. Our fees include our normal travel, printing, computer services, and mail/delivery charges. The invoice is due and payable upon receipt by the Client.

Client Responsibility

The following expenses are not included in our Scope of Services, and are the responsibility of Client to pay directly:

Services rendered by Client’s engineers, planners, surveyors, appraisers, assessors, attorneys, auditors and others that may be called on by Client to provide information related to completion of the Project.

Preparation of maps necessary for inclusion in the Project Plan.

Preparation of maps necessary for inclusion in the base year or amendment packet.

Publication charge for the Notice of Public Hearing and Notices of Joint Review Board meetings.

Legal opinion advising that Project Plan contains all required elements. (Normally provided by municipal attorney).

Preparation of District metes & bounds description. (Needed in Phase III for creation of new districts, or amendments that add or subtract territory).

Department of Revenue filing fee and annual administrative fees. The current Department of Revenue fee structure is:

Current Wisconsin Department of Revenue Fee Schedules	
Base Year Packet	\$1,000
Amendment Packet with Territory Addition	\$1,000
Amendment Packet with Territory Subtraction	\$1,000
Base Value Redetermination	\$1,000
Amendment Packet	No Charge
Annual Administrative Fee	\$150

Section G: Summary Fee Schedule

We want our clients to feel that they received more in value from our work than we received in compensation, and are always striving to keep project costs down for the City.

Project 1: \$ 3,000

Project 2: \$15,000

Project 3: \$ 3,000

Project 4: \$15,000

Project 5: \$ 9,000

Project 6: Hourly per schedule

Project 7: Hourly per schedule

Invoices are sent around the tenth of each month and are due upon receipt. Invoices will be segregated by project.

Section H: Managing Potential Conflicts of Interest

Ehlers only represents local and state government; we do not represent any private developers, lenders, landowners, or other private parties. At this time, Ehlers does provide financial advisory services to overlapping taxing jurisdictions that may conflict with the City desire to create and/or amend TIDs. We always disclose this representation and ensure that both parties are comfortable with our role. If there is a potential for a conflict of interest, we create a “firewall” internally with different advisors representing the respective clients.

Appendix A: Resumes



Phil Cosson, CIPMA
Senior Municipal Advisor/Director

Phil has been a Municipal Advisor in the Ehlers' Wisconsin office since 1996 assisting Wisconsin cities, townships, counties, public utilities, and special districts design and implement financial solutions. Prior to joining Ehlers he had eight years of local government experience working at the Southeastern Wisconsin Regional Planning Commission and for the City of Ocala Florida. One of Phil's greatest contributions to Ehlers and our clients is his ability provide sound financial solutions that have led to the financial success of his clients while building strong mutually beneficial relationships.



Phil Cosson
Direct: (262) 796-6161
pcosson@ehlers-inc.com

Areas of Expertise

Debt Planning and Issuance

- Analysis & Presentation of Alternative Financing Options, Funding Sources, Plans And Tools
- General Obligation and Revenue Debt
- CDA/RDA Lease Revenue Bonds
- Special Assessment Bonds
- Refundings/Cash Defeasances
- Representation to Bond Market & Credit Rating Agencies

Strategic and Financial Planning

- Capital Improvements Planning
- Project Feasibility Studies
- Financial Goals & Objectives Facilitation
- Project Impact Analysis
- Financial Management Plans

Economic Development

- Tax Increment District Creation & Amendment
- CDA/RDA Creation
- Developer Pro forma Analysis
- Development Agreement Negotiation
- Developer Performance Evaluation
- Redevelopment Plan Creation

Public Participation

- Public Participation Process
- Community Goals & Objectives Facilitation
- Project Planning
- Referendum Services

Licenses and Certifications

- Series 50 License
- Certified Independent Professional Municipal Advisor (CIPMA) by the National Association of Municipal Advisors (NAMA)
- National Development Council – Economic Development Finance Professional

Professional Memberships

- WI City/County Management Association
- Wisconsin Economic Development Authority
- Wisconsin Government Finance Officers Association
- WI Clerks, Treasurers Finance Officers Association
- Municipal Treasurers Association of Wisconsin
- WI Municipal Clerks Association
- National Government Finance Officers Association
- National Association of Independent Financial Advisors

Education

- Bachelor of Science (Geography),
University of Wisconsin-Milwaukee, WI
- Master's Degree (City Planning),
Georgia Institute of Technology-Atlanta, GA

Notable Projects



Dawn R. Gunderson; CPFO, CIPMA
Senior Municipal Advisor/Vice President

Dawn has been a Municipal Advisor in the Ehlers' Wisconsin office since 2004 assisting Wisconsin cities, villages, towns, counties, and public utilities with the design and implementation of financial solutions. Prior to joining Ehlers she had over 25 years of local government experience working for communities and agencies in Wisconsin, Iowa and Illinois, most recently serving eight years as the Finance Director for the City of Muskego, Wisconsin. One of Dawn's greatest contributions to Ehlers and her clients is her extensive knowledge and experience in municipal finance and accounting, enhancing her ability to evaluate financial conditions and provide long-term solutions to individual client needs.



Dawn Gunderson
Direct: (262) 796-6166
dgunderson@ehlers-inc.com

Areas of Expertise

Debt Planning and Issuance

- Debt Planning and Issuance
- Analysis & Presentation of Alternative Financing Options, Funding Sources, Plans And Tools
- General Obligation and Revenue Debt
- CDA/RDA Lease Revenue Bonds
- Special Assessment Bonds
- Refundings/Cash Defeasances
- Representation to Bond Market & Credit Rating Agencies

Strategic and Financial Planning

- Capital Improvements Planning
- Project Feasibility Studies
- Financial Goals & Objectives Facilitation
- Project Impact Analysis
- Financial Management Plans
- Impact Fee Studies

Economic Development

- Tax Increment District Creation & Amendment
- CDA/RDA Creation
- Developer Recruitment
- Developer Pro forma Analysis
- Development Agreement Negotiation
- Developer Performance Evaluation

Public Participation

- Public Participation Process
- Community Goals & Objectives Facilitation
- Project Planning
- Referendum Services

Licenses and Certifications

- Series 50 License
- Certified Independent Professional Municipal Advisor (CIPMA) by the National Association of Municipal Advisors (NAMA)
- Certified Public Finance Officer
- Certificate in Management (ICMA)

Professional Memberships

- International City Managers Association
- WI City/County Management Association
- Wisconsin Government Finance Officers Association
- WI Clerks, Treasurers Finance Officers Association
- Municipal Treasurers Association of Wisconsin
- WI Municipal Clerks Association
- National Government Finance Officers Association

Education

- Associates Degree (Accounting),
Scott Community College, Bettendorf, IA
- Bachelor of Arts (Business Administration),
Saint Ambrose University, Davenport, IA

Notable Projects

- Assist Jefferson County, Wisconsin with the development and implementation a Multi-year financing plan for their \$17.2 Million Highway Facilities which opened in the Summer of 2015.
- Assisted the Village of Shorewood with the creation and amendments of various Tax Increment Districts and the ongoing review and analysis of their performance.
- Assisted the City of Mequon with the creation and implementation of Tax Increment District resulting in the Town Center Development
- Assisted the Village of Thiensville with the issuance of Special Assessment B Bonds so that failing private community well systems could connect with Municipal water through the City of Mequon.