



## CITIZENS ADVISORY REVIEW COMMITTEE

Thursday, May 14, 2020 – 12:00 p.m.

400 East Military, Fremont, Nebraska (attendance is limited) and Zoom

Topic: Citizens Advisory Review Committee Meeting

Time: May 14, 2020 12:00 PM Central Time (US and Canada)

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You will be connected to the meeting.

If making a comment during a public hearing or comment period please **press \*9 to electronically raise your hand** allowing the Chairman to call on you.

Once called upon to speak please press **\* 6 to unmute your phone; press \* 6 again to mute when finished speaking**

# **CITIZENS ADVISORY REVIEW COMMITTEE**

**Thursday, May 14, 2020 – 12:00 p.m.**

**400 East Military, Fremont, Nebraska (attendance is limited) and Zoom**

1. Call to Order
2. Approval of minutes from April 17, 2020 meeting.
3. Review Fund Balance.
4. Consider edits made to matrixes uses to assist in determining Local Option Economic Development Fund award amount and loan elements.
5. Consider Application from Summit Medical Staffing, LLC for a Local Option Economic Development Fund loan.
6. Adjourn.

This agenda was posted at the Municipal Building and was distributed to the members of the Citizens Advisory Review Committee on May 7, 2020. The official current copy is available at City Hall, 400 East Military Avenue. A copy of the Open Meeting Law is posted for review by the public.

**CITY OF FREMONT CITIZEN ADVISORY REVIEW COMMITTEE  
APRIL 17, 2020 – 10:00 A.M.**

A meeting of the Citizen Advisory Review Committee was held on April 17, 2020 at 10:00 a.m. in the 2<sup>nd</sup> Floor Conference Room at 400 East Military Avenue, Fremont, Nebraska and Zoom video/teleconference. The meeting was preceded by publicized notice in the Fremont Tribune and the agenda displayed in the Municipal Building. The meeting was open to the public. A continually current copy of the agenda was available for public inspection at the office of the City Administrator, 400 East Military Avenue. The agenda was distributed to the Citizen Advisory Review Committee on April 15, 2020 and posted, along with the supporting documents, on the City's website. A copy of the open meeting law is posted continually for public inspection.

**ROLL CALL**

Roll call showed Members Johannsen, Schulz, Wiese Martinez and Proskovec present. Martinez 5 present, 0 absent. Others in attendance included Lottie Mitchell, City of Fremont and Garry Clark, Greater Fremont Development Council.

**APPROVAL OF MINUTES FROM JANUARY 28, 2020 MEETING.**

Moved by Member Wiese and seconded by Member Schulz to approve the minutes of the January 28, 2020 meeting. Ayes: Johannsen, Schulz, Wiese Martinez and Proskovec. Motion carried 5-0.

**REVIEW QUARTERLY REPORT.**

Mitchell reviewed quarterly report. No motion received.

**REVIEW FUND BALANCE.**

Mitchell reviewed fund balance. No motion received.

**CONSIDER OBJECTIVE FRAMEWORK TO ASSIST IN DETERMINING LOCAL OPTION ECONOMIC DEVELOPMENT FUND AWARD AMOUNT AND LOAN ELEMENTS.**

Mitchell gave overview. Discussion lead to agreed consensus in approval of the new matrix. Mitchell stated is in draft format, suggestions and edits will be brought to the committee at a future meeting. No motion received.

**ADJOURNMENT**

Moved by Member Wiese and seconded by Member Proskovec to adjourn. Ayes: Johannsen, Schulz, Wiese Martinez and Proskovec. Motion carried 5-0. Meeting adjourned at 10:31 a.m.



## STAFF REPORT

TO: Citizens Advisory Review Committee  
FROM: Lottie Mitchell, Grant Coordinator  
DATE: May 14, 2020  
SUBJECT: LB840 Application Review Tools

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**Recommendation:** Consider edits made to objective framework to assist in determining Local Option Economic Development (LB840) Fund award amount and loan elements.

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**Background:** The matrixes used to assist staff and the committees in awarding LB840 loans and grants and determining what interest rates are appropriate were reviewed in April by the committee.

Suggestions were discussed at the meeting and the edits have made. They are as follows:

- Scoring matrix updated to reflect zero points for wages under \$20 per hour.
- Scoring matrix updated to reflect zero points for less than five-year commitments.
- Scoring matrix updated to reflect zero points for when City's participation level is higher than 40%.
- Matrix on application updated to reflect current wages.
- Eligibility guidelines updated to reflect 125% or greater wages.

**Fiscal Impact:** None.



2 points = 8+ years  
4 points = 6-8 years  
6 points = 3-5 years

8 points = 1-2 years  
10 points = less than one year

# Local Option Economic Development Loan Fund and Economic Enhancement Fund Application



The purpose of the Local Option Development Plan Loan and Economic Enhancement Fund is to encourage population growth, new industries, and investment in the community. Funds are offered to businesses in the form of low or 0% interest loans and performance-based forgivable loans (grants), based upon creation of new jobs and investment in Fremont. Businesses must provide matching funds for the project.

Potential City uses include land improvements; public infrastructure; building acquisition and improvements; retail industry; service industry; other new industry; equipment, working capital, job training and buy-down leases for Primary Industry; equipment, job training, buy-down leases, land improvements, building acquisition and improvements and infrastructure for Non-primary Industry; and other economic development activities allowed by statute.

Eligible activities under the Economic Development Plan may include the following to attract new and existing business and industry development in Fremont.

- Land purchase/options
- Infrastructure to new or existing business and industry
- Site improvements
- Construction for new or existing business or industry or on a speculative basis

**The matrix for the two programs include:**

**Interest Rate Qualification Criteria:**

<b>Jobs</b>	
Compensation	Interest Rate
> \$25.00/hour and benefits	0%
> \$20.00/hour and benefits	2%
< \$20.00/hour and benefits	4%
No benefits offered	6%

<b>Investment</b>	
City Participation	Interest Rate
<10%	0%
10% - 19.99%	2%
20% - 29%	4%
30% +	6%

*Benefits = 50% of the cost of health insurance paid by the employer*

<b>Sales Tax -</b> <i>Based on initial years taxable sales</i>	
Taxable Sales	Interest Rate
>\$999,999	0%
\$500,000 - \$999,999	2%
\$250,000 - \$499,999	4%
\$50,000 - \$249,999	6%

Businesses will be given the benefit of the category under which they meet the requirements for the lowest interest rate. Based on staff discretion, up to a 2% reduction will be provided if multiple categories are met. The interest rate will never be less than 0%.

Loans will be structured as at-risk or performance based forgiveness. To qualify for a performance based forgiveness loan, the applicant must:

Pay employees at 125% of the Dodge County average wage; and Have taxable investment greater than \$2.5 million dollars, or Have taxable sales greater than \$2.5 million dollars.

Note: Based on special circumstances, staff can make recommendations to the City council outside of these parameters.

To be considered for financial assistance, applicants must provide a completed application, including all applicable attachments. Return completed application to

**City of Fremont**  
**Attn: Grant Coordinator**  
**400 E. Military**  
**Fremont, NE 68025**

**City of Fremont LB840- Local Option Economic Development Fund**

**Eligibility Guidelines**

	<b>Tier One</b>	<b>Tier Two</b>	<b>Tier Three</b>	<b>Tier Four</b>	<b>Tier Five</b>	<b>Tier Six</b>
<b>Wages*</b>	100% to 125% (or greater) of Dodge County Average Hourly Wage (i.e. \$18.95 to \$23.69+)					
<b>Job Creation</b>	1 to 5	6 to 25	26 to 50	51 to 100	101 to 500	501 and up
<b>Capital Investment**</b>	\$50,000 and up		\$1 million and up		Over \$10 million	
<b>Sales Tax</b>	Gross sales of \$50,000 to \$499,999		Gross sales of \$500,000 to \$999,999		Gross sales over \$1 million	
	<i>Project must meet at least two of the four criteria to be eligible for that tier. For each criteria met, 25% of the loan will be considered for forgiveness.</i>					

**Program Features**

	<b>Tier One</b>	<b>Tier Two</b>	<b>Tier Three</b>	<b>Tier Four</b>	<b>Tier Five</b>	<b>Tier Six</b>
<b>Interest Rate</b>	0 to 6 %					
<b>Assistance Caps</b>	Up to 25% of annual payroll of new jobs or \$50,000, whichever is least	Up to 25 % of annual payroll of new jobs or \$200,000, whichever is least	Up to 20% of annual payroll of new jobs or \$350,000, whichever is least	Up to 20% of annual payroll of new jobs or \$500,000, whichever is least	Up to 15% of annual payroll of new jobs or \$750,000, whichever is least	Up to 15% of annual payroll of new jobs or \$1,000,000, whichever is least
<b>Forgiveness</b>	Additional portions of loan forgiveness may be considered in certain circumstances where the job creation requirement has been met and the applicant has demonstrated significant benefit to the community.					
	<i>Recommendations of contract terms will be made by City staff based on application information, credit analysis, and available funds.</i>					

**Additional Items**

\*Positions must receive health insurance and other benefits. The Dodge County "annual average weekly wage" is found here: [http://data.bls.gov/cew/apps/data\\_views/data\\_views.htm#tab=Tables](http://data.bls.gov/cew/apps/data_views/data_views.htm#tab=Tables) (NAICS Industries by Geography, All Industry Levels, One Area, Dodge County, Nebraska, Prior Year/Quarter Annual Averages, All Establishment Sizes; Source: Quarterly Census of Employment and Wages – Bureau of Labor Statistics) and divided by 40 hours to determine hourly wage.)

\*\*Participation in other local programs like tax increment financing or Economic Enhancement Fund will be taken into consideration.

## STAFF REPORT

TO: Citizens Advisory Review Committee  
FROM: Lottie Mitchell, Grant Coordinator  
DATE: May 14, 2020  
SUBJECT: Summit Medical Staffing, LLC Local Option Economic Development Fund Application

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**Recommendation:** Consider application from Summit Medical Staffing, LLC for a Local Option Economic Development Fund loan.

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**Background:** The City of Fremont has a Local Option Economic Development (LB840) Plan (the Plan) and loan fund for the purposes of creating new jobs, expanding the labor market, retaining existing jobs, attracting new capital investment, broadening the tax base, and providing economic diversification to ensure economic stability and vitality for the City of Fremont and surrounding areas.

Applications are submitted to the plan administrator (City of Fremont) for review. Once the plan administrator has reviewed and determined the application is eligible for LB840 funds, the application is reviewed by the Citizens Advisory Review Committee (CARC) and the Local Option Review Team (LORT).

The CARC reviews the application from the standpoint of compliance with the Plan. The LORT reviews the application from the standpoint of project feasibility and the potential future economic benefit to the community of Fremont. Both committees make recommendations to the City Council. The City Council will then consider the overall benefits to the community and will have final authority on approval of the application.

Summit Medical Staffing, LLC submitted an application to the LB840 fund. They have recently relocated to Fremont. They are leasing a facility in Fremont and currently have five (5) full time employees. Their plan is to create at least forty (40) new, full-time, benefited positions within three (3) years of award. The average annual salary is \$45,000, plus commission. They are requesting \$300,000 from the Local Option Economic Development Fund.

Summit Medical Staffing, LLC is an eligible business under Fremont's Local Option Economic Development Plan in that their principal source of income is derived from the sale of services in interstate commerce. An executed lease agreement for a term of three years for a commercial property in Fremont has been provided.

Staff recommends three (3) separate installments of \$100,000, with 50% of each installment forgiven based on performance measures and 50% of each installment repaid at 3% interest. Each installment is forgiven and repaid over a five (5) year period after the date of issuance.

- 1) Startup - \$100,000
  - \$50,000 repaid at 3% interest over 60-month period,
  - \$50,000 forgiven over 60-month period, performance based.

- 2) End of Year 1 – \$100,000
  - Contingent upon creation of 10 new, full time jobs in Fremont, paid at an average annual salary of \$45,000,
  - \$50,000 repaid at 3% interest over 60-month period,
  - \$50,000 forgiven over 60-month period, performance based.
- 3) End of Year 2 – \$100,000
  - Contingent upon creation of additional 15 new, full time jobs paid at an average annual salary of \$45,000,
  - \$50,000 repaid at 3% interest over 60-month period,
  - \$50,000 forgiven over 60-month period, performance based.

Performance based forgiveness measures based on retention of jobs created in Fremont for five (5) years from the date of creation of said jobs.

**Fiscal Impact:** Local Option Economic Development Fund - \$300,000.

# Local Option Economic Development & Economic Enhancement Fund Application



*Here We Grow*



# Local Option Economic Development Loan Fund and Economic Enhancement Fund Application



The purpose of the Local Option Development Plan Loan and Economic Enhancement Fund is to encourage population growth, new industries, and investment in the community. Funds are offered to businesses in the form of low or 0% interest loans and performance-based forgivable loans (grants), based upon creation of new jobs and investment in Fremont. Businesses must provide matching funds for the project.

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Eligible activities under the Economic Development Plan may include the following to attract new and existing business and industry development in Fremont.

- Land purchase/options
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**The matrix for the two programs include:**

**Interest Rate Qualification Criteria:**

<b>Jobs</b>	
Compensation	Interest Rate
> \$18.00/hour and benefits	0%
> \$16.00/hour and benefits	2%
< \$14.00/hour and benefits	4%
No benefits offered	6%

<b>Investment</b>	
City Participation	Interest Rate
<10%	0%
10% - 19.99%	2%
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*Benefits = 50% of the cost of health insurance paid by the employer*

<b>Sales Tax -</b> <i>Based on initial years taxable sales</i>	
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**Attn: Grant Coordinator**  
**400 E. Military**  
**Fremont, NE 68025**



**City of Fremont, Nebraska**  
**Request for Assistance Agreement**

THIS REQUEST, is made on this \_\_\_\_ date of \_\_\_\_\_, 20\_\_\_\_, by \_\_\_\_\_,  
of \_\_\_\_\_  
(hereinafter referred to as “Applicant” to the City of Fremont, Nebraska hereinafter referred to as the “City”).

WITNESSETH:

WHEREAS, APPLICANT has requested the CITY to investigate the feasibility of obtaining a Local Option Development Plan Loan or Economic Enhancement Loan in connection with the financing of a project to be undertaken by APPLICANT.

NOW, THEREFORE, in consideration of the request the following may be done.

1. City agrees to work with the Applicant to investigate the feasibility of obtaining financing through a Local Option Development Plan Loan or Economic Enhancement Loan for the Project. City will investigate the financial condition of Applicant and determine whether or not a Local Option Development Plan Loan Application or Economic Enhancement Loan Application is appropriate. City will submit the needed paperwork for a Local Option Development Plan Loan or Economic Enhancement Loan for the Applicant to the appropriate committees and City Council, if:
  - Applicant is within the eligibility criteria and the Project is likely to be approved by the City Council for a Local Option Development Plan or Economic Enhancement Loan, and;
  - All other elements of the Project can be financed and/or paid for through the infusion of equity capital by the Applicant.
2. If the City determines, in its sole discretion, that the Applicant is eligible for a Local Option Development Plan Loan or Economic Enhancement Loan, then, and in such event, City will advise and consult with the Applicant in the preparation by the Applicant for a complete set of Loan documents together with supporting exhibits, for the purpose of making applications for an Local Option Development Plan Loan or Economic Enhancement Loan (hereinafter referred to as the “Loan Package”). The Loan Package shall be for the sole benefit of the Applicant provided however, that such Loan Package shall be used by the City in connection with the Application for a City Loan on behalf of the Applicant, provided, however, that the Loan Package may be used by the Applicant in seeking financial assistance or guarantees from other governmental agencies and/or private lenders.
3. Applicant hereby acknowledges that the Applicant is charged with the actual responsibility of preparing the Loan Package, and that the City’s sole responsibility in connection with the preparation of the Loan Package shall be to consult with and advise the Applicant. The Applicant further acknowledges that the Applicant will be required to promptly and accurately supply financial information concerning the Project, the operation of Project, together with the manner, method and terms of financing the Project. Applicant further specifically acknowledges and agrees that the obtaining of a Local Option Development Plan Loan or Economic Enhancement Loan, or any other financing is dependent upon many factors that the City cannot control, including but not limited to economic factors and the decisions of the City Council, accordingly, the City does not guarantee that the Applicant will obtain financing for the Project. Applicant hereby covenants and agrees that the City shall not be responsible, in any manner, or liable to the Applicant or any other person in the event that the Applicant is unable to obtain a Local Option Development Plan Loan or Economic Enhancement Loan for the Project, or any other type of financing for the Project, whether from the City or any other governmental or public source, or from any private financing sources. Applicant also further covenants and agrees that the City shall not be liable for any of the debts or obligations incurred in and for the assistance of benefit of the Applicant. Applicant further agrees that the Applicant will hold the City harmless, and pay all costs and expenses, including attorney’s fees, in the event that any claim in made or lawsuit is filed by or against the City arising out of any transaction with or assistance to the Applicant which may in any way be connected with the Agreement.

IN WITNESS WHEREOF, the parties hereto have executed, caused to be duly executed this Agreement, and have affixed or caused to be duly affixed hereto there seals, this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

APPLICANT

BY:

# Local Option Economic Development Loan Fund and Economic Enhancement Fund Application

(Application is an Official Public Document)



## Part I

### A. Business Borrower Information

Name of Business to receive assistance: \_\_\_\_\_

Address: \_\_\_\_\_  
(City, State & ZIP)

#### Representative Contact Information

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Title: \_\_\_\_\_ Phone: \_\_\_\_\_

#### Business Clarification (mark one)

- |                                                     |                                                    |
|-----------------------------------------------------|----------------------------------------------------|
| <input type="checkbox"/> Manufacturing              | <input type="checkbox"/> Research & Development    |
| <input type="checkbox"/> Warehousing & Distribution | <input type="checkbox"/> Administrative Management |
| <input type="checkbox"/> Service                    | Headquarters                                       |

Federal Tax ID # \_\_\_\_\_

#### Business Organization (mark one)

- |                                         |                                      |
|-----------------------------------------|--------------------------------------|
| <input type="checkbox"/> Proprietorship | <input type="checkbox"/> Partnership |
| <input type="checkbox"/> Corporation    | <input type="checkbox"/> Other       |

Does the Company have a Parent or Subsidiaries?

- Yes  
 No

If yes, identify name: \_\_\_\_\_

Address: \_\_\_\_\_  
(City, State & ZIP)

#### Business Type

- Start-up (0-5 years old)  
 Buyout  
 Existing

If existing, how many years in Business?

Ownership Identification: List all officers, directors, partners, owners, co-owners and all stakeholders with 20% or more of the stock.

Name	Title	Ownership %

**Employment Information**

Personnel (Full-Time Equivalent, FTE is based upon 2,080 hours per year)

Existing number of FTE Positions:

FTE Positions to be created within \_\_\_\_\_ months of Application Approval:

If jobs would be lost without loan approval, total number of FTE jobs retained:

What is the average wage for employees?

Please describe all benefits which the business provides to employees:

**B. Project Information**

Use of Funds	Total Project Cost	Loan Funds Requested	Total Funds
Land Acquisition			
Building Acquisition			
Renovation			
New Facility Construction			
Acquisition of Machinery/Equipment			
Acquisition of Furniture/Fixtures			
Working Capital (Includes Inventory)			
Other (Specify)			
<b>Total</b>			

Project Schedule:

### C. Sources of Funds

*Note: Public sources of financing requires the participation of a Bank and/or an injection of equity (non-debt funds).*

#### Participating Lender Information:

Name of Lending Institution: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_  
(City, State & ZIP)

Phone: \_\_\_\_\_

Loan Amount: \$ \_\_\_\_\_

Loan Term (Yrs): \_\_\_\_\_

Interest Rate: \_\_\_\_\_

Variable: \_\_\_\_\_

Fixed: \_\_\_\_\_

Collateral Required: \_\_\_\_\_

Equity Required: \_\_\_\_\_

Equity Information: \_\_\_\_\_

Amount Available from business or owners for investment: \$ \_\_\_\_\_

Source of owner's equity into project into the project: \_\_\_\_\_

#### Project Location:

- Within the City Limits (Fremont)
- Outside of City Limits but within the Zoning Jurisdiction of (Fremont)
- Unincorporated Area (Dodge County)

### D. Attach the Following (Items 8-13 shall be considered confidential)

**Brief Description of the Business' history:**

**Brief Description of the proposed project. Has any part of this project been started?**

**Description of impact of project on Applicant and Community:**

**Have you ever declared bankruptcy?**

Yes

No

If yes, bankruptcy chapter:

Case #:

Date:

Are there any unsatisfied judgments against you?

Yes

No

Amount per month:

To Whom:

Are you a party to a lawsuit?

Give details:

3-year historical balance sheets and operating statements. Current statements less than 90 days old. (Existing businesses only). Provide the following and reconcile to current balance sheet.

Aging of Accounts Payable and Accounts Receivable

List of current obligations

Personal financial statement and resumes for each person owning 20% or more of the business.

Credit Report from Credit Reporting Agency. Contact your bank for more information.

Monthly cash flow analysis for the next 12 months and for new businesses, 3 months beyond the breakeven point.

Indemnification Agreement

Tax returns for the last two years.

Once all documents have been received, the City of Fremont staff will review the application if it meets the Local Option Economic Development Plan Fund or Economic Enhancement Loan Fund eligibility requirements. If eligible, a meeting will be scheduled with you.

The above information is accurate to the best of my knowledge and belief. The above information is provided to help you evaluate the feasibility of obtaining public financial assistance. I understand that pages 1-3 of the application are public information and are subject to public disclosure during the application process.

Signature

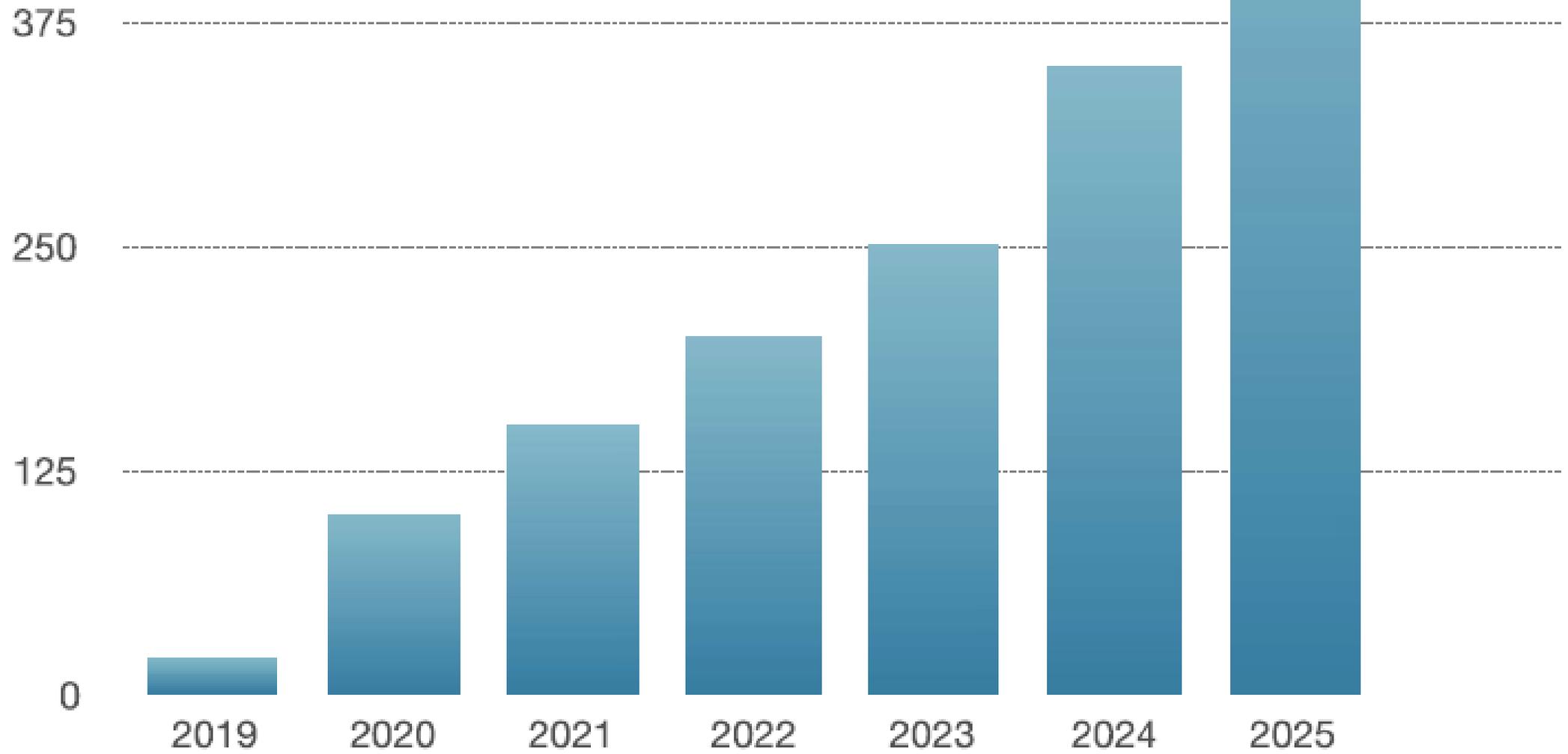
Dated

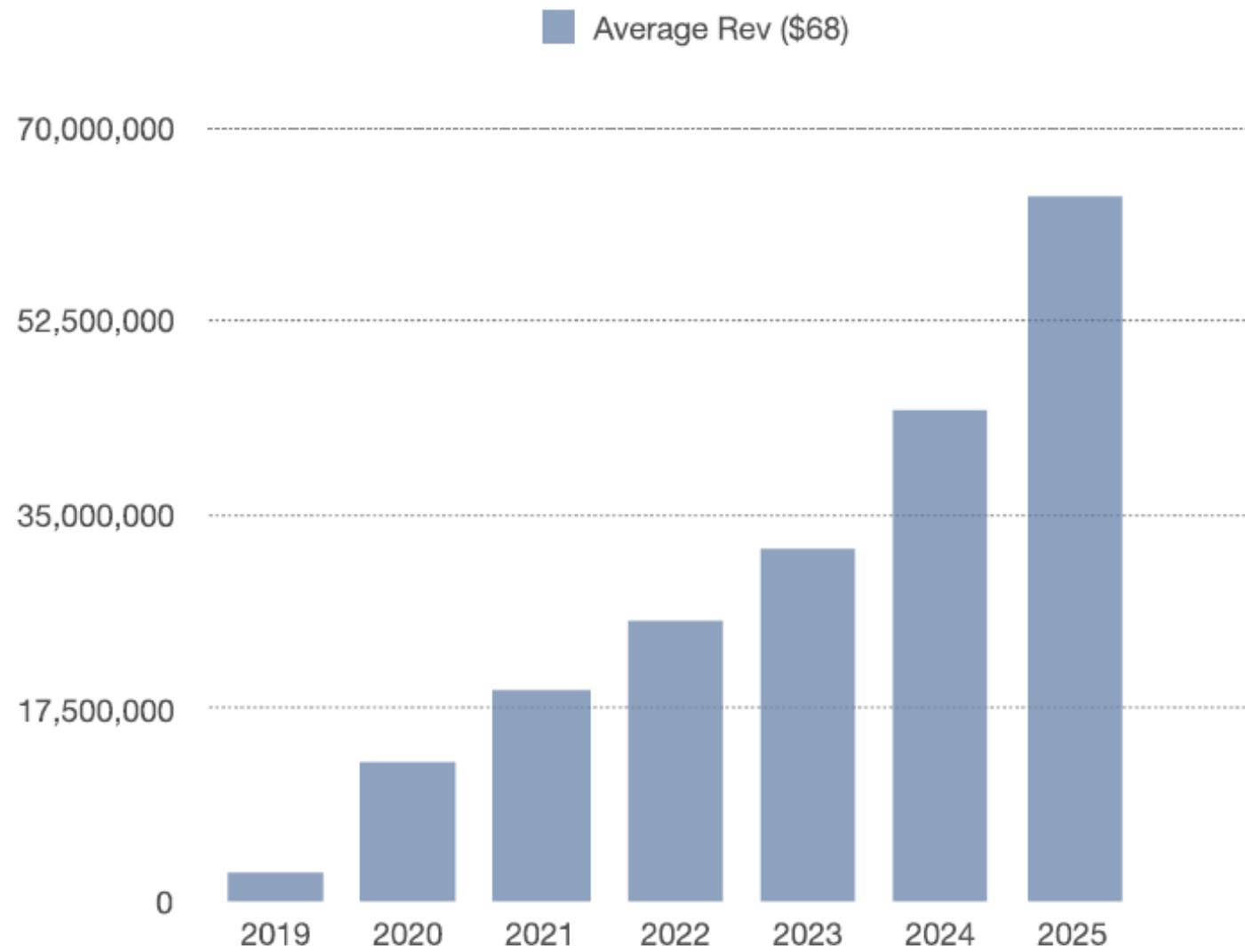


# Summit Medical Staffing, LLC

## PROJECTIONS

	Headcount	Average Rev (\$68)	Net Revenue \$12 GPH	
<b>2019</b>	20	2,545,000	449,280	
<b>2020</b>	100	12,725,000	2,246,400	
<b>2021</b>	150	19,087,000	3,369,600	
<b>2022</b>	200	25,450,000	4,492,800	
<b>2023</b>	250	31,824,000	5,616,000	
<b>2024</b>	350	44,553,000	7,862,400	
<b>2025</b>	500	63,648,000	11,232,000	





## FIXED COSTS MONTHLY

	First 6	5 additional	7 additional	10 additional
<b>Salary</b>	42250	66625	76375	91000
<b>Office lease</b>	1,600	1600	1600	1600
<b>Miscellaneous</b>	2000	2000	2000	2000
<b>Leads</b>	1500	1500	2000	2500
<b>Phones/internet</b>	700	700	700	700
<b>Utilities</b>	400	400	400	400
<b>Sales force</b>	300	400	440	500
<b>Microsoft</b>	84	84	84	84
<b>Comp/liability</b>	750	750	750	750
<b>Go daddy</b>	56	112	129	168
<b>Prophecy exams</b>	9	9	9	9
<b>Jot forms</b>	13	13	13	13
<b>DocuSign</b>	25	25	25	25

	First 6	5 additional	7 additional	10 additional
	49687	74218	84525	99749

**VARIABLE COSTS**

	25 nurses	50	100	150
<b>Commissions @10%</b>	5304	10608	21216	31824
<b>Employee health</b>	4750	9500	19000	28500
	10054	20108	40216	60324

# CAPITAL COSTS

	Us	5 recruiters	7	10
<b>Phones</b>	650	1350	945	2025
<b>Computers</b>	4000	8000	9600	12000
<b>Cubes</b>	0	0	0	500
<b>Chairs</b>	500	1000	1200	1500
<b>IT set up</b>	1000	2000	2400	3000
	6150	12350	14145	19025

## **Executive Summary**

Summit Medical Staffing, LLC is an established company, which provides staffing and consulting solutions to various medical facilities. We intend to grow the company and establish our name as a leader and innovator in the medical staffing industry. We will not be content with pursuing a small share in a giant market. Instead we intend to constantly strategize, seek out, and capture major shares in smaller niche markets, which we can dominate and expand. Our innovative marketing techniques will constantly be refined and altered to adapt to ever changing needs of our clients. Our primary focus will be to build client relationships including consultation services in the medical field to ensure all present and future needs are met. Our goal is to work closely with nursing, therapy, and allied health professionals to achieve a mutual benefit for the employee and the employer.

This business plan is part of our regular business planning process. We will revise this plan annually. In the next full year we intend to market our services nationally to a variety of facilities.

We have anticipated sales projections of 50 placements within the coming year. This will place sales volume at \$6,000,000 for the year. Management predicts sales exceeding \$12 million and additional profitability by year two on a reserved level. Projected profits in year five are expected to be north of \$50,00,000.

Our critical success factors for the next year are, in order of importance:

- Mass marketing to therapist, allied health, and nursing professionals.
- Market and obtain national acute care accounts.
- Obtain feedback from employee's and employers.
- Test marketing of media, public relations, pricing, and service endorsement plans.
- Attain the goal of recouping expansion costs in one year.

Additionally:

- Building on profits for the next year.
- Reaching sales goals for the next three year.
- Attaining profitable growth to new complex in year five of the expansion plan.

## **Objectives**

Summit Medical Staffing, LLC has set a modest goal for 2020 sales. These targeted minimums when achieved, will bring us a moderate profit for year one and will provide a platform for limited business expansion in the second year of expansion.

The sales goals for medical professional placements in coming year are:

- Nursing— 50 placements

Attaining these targeted goals will result in a projected year one sales volume of \$6,000,000.

Costs will be controlled to maintain projected margins at these modest sales levels. If sales exceed these goals additional staffing and stepped-up marketing activity can and will be implemented quickly, although additional capital may be required on short notice in order to fully implement growth.

## **Mission**

Summit Medical Staffing, LLC is a medical staffing and consulting company dedicated to providing the highest quality medical personnel paired up with equally qualified medical facilities. We anticipate providing quality-tested services and making sufficient profits to generate a modest return. Our initial service will focus on temporary and permanent staffing solutions within allied health, therapy, and nursing fields. Our continued growth will consist of developing and acquiring additional services once our marketing platform has been established. We will conduct our business in accordance with moral values, maintaining a friendly, fair, and creative work environment, which respects the ideas, hard work, dignity, and worth of our employees.

## **Keys to Success**

Keys to success for Summit Medical Staffing, LLC:

- Marketing and Recruiting. The success of Summit Medical Staffing, LLC rests in the marketing and recruiting venue. Most critical to success is our ability to generate leads through innovative and effective marketing solutions for the growth of sales and revenue.
- Management. While there is a temptation to grow a business exponentially, it is critical that Summit Medical Staffing, LLC management team concentrate first on proving customer service within certain parameters, maintain margin requirements, and establish consumer acceptance. Once the primary goals have been established, then controlled expansion (which may require increased investment in the organization) can be executed with confidence.
- Exceptional Customer Service.
- Guaranteeing clients that the temporary employees being contracted are fully screened through the following process.
  - Drug Screen
  - Criminal Background Check
  - Skills Proficiency Evaluation
  - Past Employment Verification
  - Past Employment References
  - Credential Verification
  - CPR Registration Verification
  - Immunization Records (TB, MMR, Hepatitis B, etc)
  - Facility Interviews

## **Expansion Summary**

The expansion costs for Summit Medical Staffing, LLC are estimated at \$750,000. These funds will be utilized to hire more recruiters, new employee startup expenses, supplies, and insurance. Additional marketing costs and overhead may be incurred.

## **Company Locations and Facilities**

A company office is presently maintained at 920 South 107<sup>th</sup> Ave, Suite 106, Omaha NE 68136. As needs dictate office facilities will be expanded. Initially, the office will serve to manage marketing functions, sales processing, and the day-to-day operations.

## **Market Analysis Summary**

The medical staffing industry market as whole and the market for staffing services are multi-billion and multi-million dollar markets respectively. Summit Medical Staffing, LLC represents a new sub category in the medical staffing market. Currently, there are several competitive entries in this segment. Our service can be utilized by any qualified medical facility currently in need of staffing services. The targeted consumers are those medical facilities that management feels will be more receptive to our services.

Complete industry specific data on markets, sub-markets, categories, trends and demographics are available in trade industry reports. These reports are available for fees and with membership in trade organizations. The leading trade industry publication is Advanced Magazine.

Our purpose is to prove viability. Market share numbers will be minute. Successful marketing along with creative and innovative strategies, Summit Medical Staffing, LLC will strive to set itself apart from named industry groups. We will utilize company data and research to project market niches we can control and succeed in.

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## **Market Segmentation**

As indicated, the product segment sought by Summit Medical Staffing, LLC is not a new one. It can best be defined by the demographic of its targeted customer. We seek to serve the medical staffing industry as a company that offers temporary and permanent staffing. Healthcare professionals and healthcare facilities define the potential market size.

With such a large potential market available, Summit Medical Staffing, LLC management is confident of the ability to sell its services in the conservative numbers estimated by first year production availability.

## **Target Market Segment Strategy**

By focusing our efforts on large hospital systems and quality employees, we can cost effectively convey our message to our prospective clients. Target media publications have already been discovered through research. Advance Magazine is an industry leader specialty publication.

In addition, there are Web sites and newsgroups that management has uncovered. They can provide targeted e-mail opportunities. Two separate software programs have been identified: One that targets newsgroups for bulk e-mail, and another that conducts "on-line applications" from identified groups. Both will be utilized in Summit Medical Staffing, LLC marketing efforts. Our current client and facility database has web sites and links to hospitals, clinics, and nursing homes nationwide. Summit Medical Staffing, LLC uses multiple avenues to reach its potential clients and customers. Phone calls, job boards, direct advertisements, mass marketing, ect. The value of these marketing tools cannot be discounted and actual sales are expected to increase exponentially in the next three years.

Web publications and social media will offer exposure for education via PR and articles as well as a means to target media effectiveness in small numbers. The premise is: If you advertise to a highly selected target audience you prove salability and price point acceptance. Then you seek to extrapolate the results via broader based media.

## **Market Segment Analysis**

Potential users define our market analysis. The use of cost-effective means to reach these users is the critical decision path. The universe of potential customers exceeds the millions. It is projected to grow only moderately each year. Through innovative marketing we will be able to provide quality services to our existing clients and seek out and identify new target audiences. Management recognizes that a market exists for temporary and permanent staffing agency.

We will concentrate heavily on bringing on qualified health care professionals with direct marketing efforts. Our recruiting will consist of on-line marketing, social media, ad placements, and cold calling.

## **Industry Participants**

Major marketers and leaders of the staffing industry include Cross Country, Aureus Medical, Fusion Medical, Medial Solutions, and others. Summit Medical Staffing, LLC management feels that these major players in the industry will not take significant notice of the sales and marketing activities of Summit Medical Staffing, LLC until such time as Summit Medical Staffing, LLC sales reach \$10 to \$20 million. That level of sales marks the point at which a business is considered substantial enough as a competitor. It will be a continuing goal of Summit Medical Staffing, LLC to have a defensible position in its customer service and a reputation as an innovator and leader. The market niches controlled will set us apart from our current competition.

## **Strategy and Implementation Summary**

Our strategy is based on serving health care professionals and organizations. The world is full of small and medium-sized businesses that provide good products and services apart from the major vendors who focus on high-volume orders only. We plan to focus on customer service to set us apart from the competition.

- What begins as a customized version of customer service, tailored to the needs of an organization, can eventually become a niche product that will fit the needs of similar customers across the country.
- We are building our marketing infrastructure so that we can eventually reach specific kinds of customers across broad geographic lines.
- We intend to focus on satisfying the needs of all temporary and permanent medical staffing.
- We will focus on leading edge technology that can take us to the masses and bring us to the experts and volume leaders in our target market audience.

## **Marketing Strategy**

Our marketing strategy will be to use a combination of target specific media and public relations execution to stimulate placement of health care professionals. Since the service and its application are not new, the task is one of education and exposure. Education and change are very expensive when they are directed at a mass audience. Thus, it is to our great advantage that our audience can be segmented into small target specific groups and reached with more inexpensive media strategies.

## **Positioning Statements**

We believe that our focused marketing strategy will work with targeted distribution. We will use direct-response marketing and email blast to reach a targeted customer base throughout the country.

We will utilize our web site to generate a new market of professionals. We will need to direct the majority of our clients to the web site. This will enable us to generate the email database for our marketing department. This will also serve to test the salability of the service to the market.

In addition, we will continue to market our services through cold calling.

## **Pricing Strategy**

Due to the fluctuation of local economic factors bill rates will vary from market to market. Summit Medical Staffing, LLC provides our clients with the option of Direct Bill or All Inclusive rates. This is an estimate of all bill rates:

## **Promotion Strategy**

The long-range goal is enough visibility to leverage our services as a player into the medical staffing industry where we can reach all regions. To do that:

- Public relations services for the next year are intended to generate awareness of editors and product information insertions, reviews, etc. This is maintained for year one and two.
- Advertising monthly and concentrating on special interest magazines. We will experiment with general-interest and industry magazines, keeping careful track of results. It is hoped that advertising through these channels will enable more placements and additional sales or will be cut back after its ineffectiveness is proven. Year two of sales reflects sales penetration into larger hospital channels.
- Trade shows: None until year two.

## **Sales Strategy**

Initially all sales are direct response. In the coming years we will look to expand to other channels, which will entail the hiring of additional staff. Actual sales goals will be measured and monitored on a continuing basis. It is estimated that one full year of marketing with the major facilities and participation in industry trade shows will be required to establish a genuine market share.

## **Sales Forecast**

The operating budget shows our present sales forecast. We are projecting sales of \$6,000,000 in the coming year which represents 50 placements made via direct marketing. We are forecasting sales to increase to \$12,000,000 in year two with expanded media expenditures and reach. This reflects an increase to 100 placements made.

## **Milestones**

After having achieved the Joint Commission Seal of Approval our future milestones for Summit Medical Staffing, LLC is to properly market our services, hire 10 more recruiters, and obtain our sales goals for the coming year. This will allow us to cover all expenses and generate a moderate return.

The next, and most significant milestone will be the sale of our services. The successful sale of our services will then launch the expanded marketing efforts with significant confidence for success. Sales success will also trigger additional hiring of employees to enable marketing and sales efforts to continue. Cash flow needs will be addressed by additional funding.

## **Management Summary**

Summit Medical Staffing, LLC will have a very thin management team at inception. Management will serve as all key internal needs such as general financial control, strategic planning, and sales and marketing implementation.

## **Personnel Plan**

Personnel requirements will continue to grow in years two and three. It will focus in on customer service and job orders. The personnel will handle all aspects of recruiting. Management will perform all back-office functions. Recruiting and job orders will be handled by the recruiters and may be supplemented with temporary employees as required. At present a line item in personnel requirements of \$500,000 is budgeted for these functions. No permanent staffing decisions will be made until year one when the business plan is revised. All expenditures represent estimates at this time.

## **Financial Plan**

Summit Medical Staffing, LLC desires to finance growth through a combination of the Cash Finder program and SBA loan. The funds will be used for initial cost of employees, insurance, and marketing to grow a larger market presence. The target of generating a moderate income in the coming year will only apply if we continue to market our customer service to prospective clients and facilities.

The most important indicator in our case is repeat business and client referrals. We have to make sure that we are able to generate contract extensions and fill customer needs while maintaining our customer service standards or we will be clogged with worthless job orders.

Collection days are very important. We do not want to let our average collection days to get above 90 under any circumstances. This could cause a serious problem with cash flow, because working capital will be tight. Fortunately, most sales will be factored to a credit foundation at the rate of 2%. Thus, business at this stage will basically have a 2% loss of cash flow. Billing and payroll distribution entails 30 to 60 day billing cycles. Every effort will be made to collect on time and to offer billing term discounts. Even when placements are billed, this plan assumes 35-day payments on all job orders in order to be conservative on cash flow demands.

We must maintain minimum gross margins of 10% and hold marketing costs to a small percentage of sales in all sales channels.

An accurate forecast of sales potential can only be made after significant sales and market acceptance by major medical facilities. Estimates for third year sales contained in this plan should be considered as such. Subsequent plan revisions will have a higher degree of accuracy.

## **Important Assumptions**

The financial plan depends on important assumptions. The key underlying assumptions are:

- We assume access to equity capital and financing sufficient to maintain our financial plan.

## **Key Financial Indicators**

The most important indicator in our case is repeat assignments and client referrals. We will strive to have limited turnover. This will be a direct measuring tool for success.

- Collection days are very important. We do not want to let our average collection days get above 45 under any circumstances. This could cause a serious problem with cash flow, because our working capital situation is chronically tight.
- We must maintain gross margins of 10 percent at the least and hold marketing costs to a minimum.

## **Break-even Analysis**

The break-even analysis shows that Summit Medical Staffing, LLC has a good balance of fixed costs and sufficient sales strength to remain healthy. Our break-even point is minimal because there is little overhead. Our sales forecast for the coming year calls for 15 total working placements.

Some costs included in the plan may be trimmed if necessary. There is a little room to cut the gap to break-even in year two with interim plan revision on the cost side, particularly by limiting marketing and expansion expenses. The break even number of placements a month is an extremely conservative break-even number since it assumes full marketing and media expenditures as called for by the plan. These expenses are treated as "fixed" when in fact they are "variable". Thus, break even is based on full expenditures.

Our ability to preserve operating expenses and maximize sales revenue will permit the company to function with some cash flow reserve during the first year. A moderate profit performance in year one on a new staffing company would be considered outstanding.

## **Projected Profit and Loss**

All expenses estimated in this initial plan are considered to be accurate but not firm. Flexibility is assumed as the plan progresses through execution.

The plan now projects a profit of \$150K in the coming years sales. This will be considered very acceptable when considered against the need of additional salaries. It is achievable only since we are pursuing low-cost channels of distribution in the beginning. Our over-all objective here remains only to prove salability and test various channels and promotional strategies while building lasting relationships.

Year two assumes new sales with a corresponding reduction in margin on the sales into that channel. Volumes increase as do ad and promo expenditures. Only one or two large contracts (assuming multiple facility locations) would be required to generate the sales volume sought provided our services have proven to be acceptable to all users. We are thus forecasting a rollover to profitability in year two with realistic targets.

If this were achieved, it would be a good time for management to look at a major financing, other acquisitions, and an aggressive expansion of Summit Medical Staffing, LLC.

## **Projected Cash Flow**

Cash flow in coming year, needs a closer look on a month-to-month basis. Since this will be entirely a function of actual sales vs expenses, it will be addressed in detail. At this juncture, the "as needed" philosophy of management still is the operative mode. Subsequent revisions of this plan in years two and three will switch to payables and receivables model. The operating budget represents the expected sales and expenses for the next 3 years.

# William C. Watts

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Omaha, NE 68136

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billcwatts@gmail.com

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## **WORK HISTORY**

- 2014-Present*      ***Summit Medical Staffing***      **Omaha, NE**  
**Managing Partner**
- Manage and run daily operation
  - Oversee all finances for the operation
  - Recruited Allied Health, Nursing, and Therapy Professionals
  - Implemented training course for new recruits
  - Established and maintained new and existing accounts
  - Negotiated ongoing sales
  - Employed new sales strategies to increase and expand sales revenue
  - Contributed to the development of major sales and marketing campaigns
  - Increased regional sales through on site and direct marketing
  - Enhanced and improved exposure to mass-market accounts
  - Formulated pricing programs to increase gross profits
  - Delivered effective solutions to a diverse range of sales related issues
- 2004– 2014*      ***Account Manager / Senior Medical Recruiter***      ***RTG Medical***
- Recruited Allied Health, Nursing, and Therapy Professionals
  - Managed and coordinated a staff of 20 field employees
  - Implemented training course for new recruits through interpersonal skills
  - Established and maintained new and existing accounts
  - Negotiated ongoing sales of with high volume accounts
- 2001– 2004*      ***Head Golf Professional***      ***Miracle Hill Golf and Tennis Center***  
***18 Hole Public Facility***      ***50,00 Rounds Annually***
- Contributed with clubhouse and facility renovations
  - Recruited, hired, and trained inside and outside services
  - Coordinated sales and inventory management procedures
  - Ordered and maintained merchandise and inventory levels of \$350,000
  - Assisted with the planning and budgeting for the facility
  - Structured a merchandise assortment plan
  - Started the Drive For Life Campaign
- 1999 – 2001*      ***First Assistant Golf Professional***      ***Miracle Hill Golf and Tennis Center***  
***18 Hole Public Facility***      ***45,000 Rounds Annually***
- Implemented Growth of the Game Advanced Junior Series
  - Developed software for tournament applications
  - Supervised and scheduled 20 employees
  - Prepared sales and marketing promotions
  - Increased customer base with the use of video lesson analysis

- 1997 – 1999      *Assistant Golf Professional*      *Eagle Hills Golf Course*  
*18 Hole Public Facility*      *25,000 Rounds Annually*
- Established business-to-business sales for corporate leagues and outings
  - Organized and marketed golf tournaments and corporate outings
  - Instructed individual and group golf lessons
  - Promoted and directed weddings and banquets
  - Enhanced revenue and sales by implementing frequent players cards

- 1994 – 1997      *Assistant Golf Professional*      *Indian Creek Golf Course*  
*18 Hole Public Facility*      *55,000 Rounds Annually*
- Managed maintenance schedules for 110 golf cars
  - Instituted sales and bonus programs for soft and hard goods
  - Maintained monthly inventory for annual sales of \$ 400,000
  - Presided over 160 member mixed golf league
  - Directed Nike junior golf camp for 400 members

- 2000 – Present      *Owner and Operator*      *ABC Fun (Comfy Feet)*  
*Seasonal Retail Sales*
- Purchased and directed the sale of college licensed apparel
  - Implemented new POS and computer system
  - Composed a business plan with complete market analysis
  - Assist in all facets of staff training and development
  - Expanded and supervised multiple locations in 2000

**MILITARY SERVICE**

- 1989 – 1995      *United States Army / National Guard*
- Attended the Primary Leadership Development Course
  - Veteran of Operation Desert Storm
  - Received Army Accommodation Medal 1991
  - Honorably discharged in 1997

**EDUCATION**

- 2002      PGA PGM Graduate - PGA Member, Class A PGA Professional  
2001      Bellevue University – Bachelor of Science, Business Management  
1994      Louisiana State University – Kinesiology

**ACTIVITIES**

Volunteer for Leukemia and Lymphoma Society  
Founder of Jacobs Journey charity golf benefit

**COMPUTER SKILLS**

Microsoft Windows      Microsoft Word  
Microsoft Excel      Microsoft Power Point

**Ashley Thomas Grohs**  
**8130 Water Color Dr.**  
**Ashley.grohs@yahoo.com**  
**402-719-3400 Cell**

## **Experience**

### **“Senior Client Manager”, Atlas Medstaff, June 2016 to February 2020**

- Focused on developing new relationships for direct contracts
- Training new CM’s as they transition in their career
- Focused on developing the largest VMS in the nation to a first tier account
- Help Leadership develop training manual and policy for future growth.

### **“Workforce Solutions Consultant”, Medefis, 10/2014 to June 2016**

- Brought in 16 new whole house solutions contracts.
- Attend Trade Shows to represent the company and develop leads
- Cold call on facilities to demo our product with the end result of a contract to staff
- Develop and maintain relationships within each facility to further sell options and products within

### **“Recruiter”, RTG Medical, 1/2012 to 4/2014**

- Employee/Staff and Recruit Medical Professionals via phone, email and social media
- Budget Expenses on all employees
- Negotiate Contracts for personnel and facilities
- Process Payroll for all associates

### **“HE Collections II” Chase Bank, Tampa, FL, (Sept, 2010 to Jan. 2012)**

- Assess Customers needs to find profitable solutions for them and the Bank
- Use Skip tracing tools to locate customers with ease and accessibility
- Meet and exceed monthly goals set by management to obtain global goal.

### **“Manager/Sales Agent” Tristate Financial Network Louisville, KY (Aug. 2008 –Sept 2014)**

- Contact Clients who responded to our marketing to set up appointments
- Conduct in-home meetings to discuss appropriate options that fits their family needs
- Deliver policies after issued date, and obtain referrals and maintain other financial needs
- Help conduct weekly sales meetings for our regional market and Conference Calls nationally
- Interview, Qualify, and Select potential candidates for our sales team.

## **Education**

College of the Canyon, Santa Clarita, CA 1999 to 2002 “ Bus. Admin”  
Fremont Senior High school, Fremont, NE 1994 to 1998 “Diploma

## **Associations**

- Knights of Columbus
- Fremont area Young Professionals (Former Board Member)
- Former Diplomat to the Chamber of Commerce

# Pete Geldes

648 Bailey St. Papillion NE 68046 -- (C) 402-350-3450 – PGeldes@gmail.com

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*Goal-driven, highly competitive professional experienced in the nurse staffing industry with a strong focus on relationship building, customer service, and leadership.*

## PROFESSIONAL EXPERIENCE

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### **Atlas MedStaff**

*Senior Recruiter – Team Lead*

**Omaha, Nebraska**

April 2016 – Present

- Always held the standard of well above the required KPI's for the last 4 years.
- Held place in the top ten recruiters in the company for 3 years straight.
- Forefront developer of multiple social media platforms used to attract and maintain TOA.
- Managed and developed 12 Recruiters and Client Managers during time as Team Lead.
- Conducted weekly training and development for new and experience recruiters within the company.
- Helped develop and run a goal driven mentorship program within the company.

### **Ralston Police Department**

*Uniform Police Officer*

**Ralston, Nebraska**

September 2014- April 2016

- Assigned to Patrol Division where I responded to calls for service throughout the city.
- Proactively conducted traffic stops resulting in arrests, citations, or warnings.
- Identified, analyzed, and effectively handled community issues and problems.
- Prepared detailed investigative reports, resulting in criminal prosecutions and convictions.

### **Dodge County Sheriff's Office**

*Uniform Patrol Deputy*

**Fremont, Nebraska**

April 2010- September 2014

- Responded to calls for service throughout the county and assisted citizens.
- Conducted investigations for ongoing cases as a result of calls for service.
- Proactively conducted numerous traffic stops resulting in arrests, citations, or warnings.
- Member of the Dodge County/Fremont ERU team and assisted in the formulation of ERU operations.
- Past President of Fraternal Order of Police lodge 17 and part of the contract negotiation team.

### **Medical Solutions**

*Client Manager*

**Omaha, Nebraska**

January 2008-January 2010

- Fastest growing client manager at Medical Solutions from 2008-2010.
- In charge of the functioning of 10-42 nurses and/or technicians at various accounts.
- Established relationships with current accounts as well as developed numerous new contracts.
- Managed accounts payable and receivables along with debt collection.
- 5 Above and Beyond awards for teamwork and leadership.
- Trained new employees in contract and rate negotiation.
- Generated over 1.8 million dollars in revenue and over \$400,000 in gross profit in 2009.

**Enterprise Rent-a-Car****Omaha, Nebraska***Assistant Manager, Eppley Airfield**November 2006-January 2008*

- Managed 20 plus employees and a fleet of over 500 vehicles.
- Controlled all profit and loss statements as well as accounts receivables list.
- Promoted to assistant manger of the largest branch in the area in 3 months.
- Placed #1 in monthly sales 3 consecutive times out of 250 plus employees including managers.
- Finished in the top 25% of the employee matrix every month with the company.
- Personally generated new business and increased profitability.
- Identified, maintained, and developed local and national corporate accounts.

**EDUCATION**

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**Dana College****Blair, Nebraska***Bachelor's Degree (2005)*

- Major: Organizational Communication with an emphasis in Media
- Played four years of Football for the College

**ADDITIONAL SKILLS**

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- Exceptional interpersonal and communication skills.
- Proficient in using a computer and Internet research, including Microsoft Word and Excel.
- Schooled in all aspects of sales promotions, ad preparation, and marketing.
- Entrepreneurial, self-starter who needs little to no supervision.
- Experienced in recognizing, analyzing, and solving problems.
- Strong focus on customer service and client relations.
- Trained and experienced in Interview and Interrogation (Reid Technique), Active Shooter Response Instructor, Crisis Intervention Team member, Certified Firearms Instructor, Etc.