

# Business Plan/Proposal

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Of:



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## BUSINESS PLAN NON-DISCLOSURE AGREEMENT

### ***By Possessing or reading this plan you accept the following:***

By proceeding within this document (the "Plan"), you, any company, entity or organization that you are employed by or are otherwise the agent of, and all other employees thereof, (collectively, "Recipient") and **{Maple Place Inc.}** ('**The Organization**'), agree that:

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- Recipient agrees to hold in the strictest confidence, and not use or disclose to anyone other than the employees of Recipient, its Representatives and **The Organization**, the information contained in the Plan or supplied to the Recipient, orally or in writing, by **The Organization** (the "Confidential Information"). Confidential information includes, without limitation, concepts, cost data, techniques, design, work in progress, and other technical know-how, the identity of customers, suppliers, and subcontractors of **The Organization**, financial, marketing and other business information, or any other trade secrets of **The Organization** disclosed by **The Organization** to Recipient or its Representatives or any summaries, analyses or other documents bases thereon. Confidential information further includes any information **The Organization** has received from others, which **The Organization** is obligated to treat as confidential or propriety. If the Recipient has any questions as to what comprises Confidential Information, the Recipient agrees to consult with an officer of **The Organization** prior to making any disclosure thereof.
- It is further agreed that any violation of this agreement by the Recipient or its Representatives will cause irreparable injury to **The Organization** and that **The Organization** shall be entitled to extraordinary relief in court, including, but not limited to, temporary restraining orders, preliminary injunctions, and permanent injections or other equitable relief. If court proceedings are required to enforce any provision or remedy any breach of this agreement, **The Organization** shall be entitled to an award of reasonable attorney's fees incurred in connection therewith.
- This business plan does not constitute an offering. Any offering will be made by a definitive offering agreement. This plan has been submitted on a confidential basis solely to determine if selected individuals or organizations have an interest in making an equity investment.

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## 1.0 Executive Summary

Maple Place Inc. is a 501(c)(3) nonprofit organization whose primary mission is to restore, preserve, and maintain the history and historic structure of the former Connor Lumber and Land Company Store and maintain its importance and significance with regard to economic progress, quality of life, and preservation of the history within the Laona community. Maple Place Inc.'s primary objectives are not only to preserve and maintain one of Laona's only remaining historic buildings, but also to provide a central, community-oriented space that promotes a sense of community, history, and cultural pride.

The entirety of the building restoration project presents multiple opportunities in the areas of community growth and development, business development, economic progress, improvement of quality of life, individual growth opportunities, and more. Maple Place Inc. will serve as a cornerstone to the Laona community with its restoration objectives in that, once the building's restoration has been completed, it will serve as an incubator to invite new businesses into the community, thereby providing by extension a development of commerce, economic growth, and community development while providing opportunities to both businesses and individuals. It is also the intention, with the creation of a back courtyard and community gardens, to involve the community not only with the project but act as a catalyst to promote community-mindedness, community involvement, and volunteerism within other facets of the local communities.

Maple Place Inc.'s board of directors is comprised of individuals with a wide spread of knowledge who fit together perfectly in generating ideas, community development, restoration efforts, historic preservation, education, arts and culture, social interaction and communication, volunteerism, and more. Each board member brings with him or her not only personal experience in one of these areas but the knowledge and passion to promote it; the Maple Place board members are not only leaders and partners but also community members as well. The Maple Place officers all have a collective experience in administration, historic preservation, grant writing and fundraising, finance and financial management, and interpersonal communication skills, allowing each of them to help effectively manage not only the board of directors but the overall components of Maple Place's project. Each member of the board of directors is also an active participant in all facets of Maple Place Inc.'s machinations, from clean-up days to fundraisers and grant writing, to community interaction and promotion of the Maple Place mission, goals, and ideals.

The estimated cost of the total restoration of Maple Place Inc. is \$1.6 million dollars. This will be divided up into both interior and exterior restoration, with roughly half of the projected amount focusing on the interior and half of the amount focusing on the exterior. The interior requires restoration of primary systems, flooring, walls, ceiling, windows, doors, and more; the exterior requires a total roof and skylight replacement, extensive restructuring of the south wall bricks, re-opening of windows and window wells, repair to brick damage, and replacement of sidewalks, parking lots, and thoroughfare. It is the intention of Maple Place Inc. to allocate as much funding as possible from grant resources, both in public and private sectors. As Maple Place Inc. serves as a nonprofit and does not have any income-generating resources, we will be relying heavily upon donations and grant awards to fund and complete this project in its entirety.

## 2.0 The Organization (Maple Place Inc.)

### 2.1 Leadership and Legal Structure

Maple Place Inc. is a 501(c)(3) nonprofit organization, registered both with the state of Wisconsin and federally with the IRS, and described as a public charity under section 509(a)(2) of the IRS, consisting solely of a volunteer board of directors and officers, not less than seven and not more than fifteen in number; the current board of directors numbers eleven with a twelfth holding an honorary, non-voting seat. Maple Place Inc. does not have any members, save for its board of directors; all other affiliates of Maple Place Inc. are of volunteer status. Maple Place Inc. is federally tax exempt with a pending state tax exemption status.

### 2.2 Location

Maple Place Inc. is located at 4894 Mill Street in Laona, Wisconsin, 54541, County of Forest. This location will be the sole physical location of Maple Place Inc.

### 2.3 Organization Description and Background

Maple Place Inc. originally began as a historic restoration project to revitalize the former Connor Lumber and Land Company Store in Laona, which would house a university for the local and surrounding communities; the restoration and university project originally began in late December of 2016 and quickly grew larger than just a building restoration and preservation with plans for a university. In May of 2018, a full year after restoration work by a volunteer staff under the flag of the university began work on the physical building, Maple Place Inc. was created as a nonprofit organization exclusively to manage the building restoration, preservation, and maintenance. Several members of the university board of directors became members of the Maple Place Inc. board of directors as well, and leadership of the building restoration transferred from the university solely to Maple Place Inc. Maple Place Inc. is undertaking the process of restoration, preservation, and maintenance of the Connor Lumber and Land Company Store, as well as spearheading its nomination for both the state and national registries of historic places; in addition, Maple Place Inc. is restoring and providing space for a multitude of businesses and organizations to occupy the building, including but not limited to: a coffee shop and bakery; the Laona Area Chamber of Commerce office and visitor center; the university, including student massage clinic, classrooms, staff offices, and student library; ballroom for private and public events; holistic wellness center; living history museum; Laona historical society; public courtyard; and community gardens. Maple Place Inc.'s restoration and preservation work of the former Connor Lumber and Land Company Store will provide not only a living historic landmark of which the town of Laona can be proud but a space that will promote both community growth and development, as well as a cornerstone for drawing non-local customers and clientele – additional economic growth and development –

to the area. Laona is a community that was once booming both economically and socially; Maple Place Inc.'s efforts in providing restoration, historic preservation, and economic growth and development will help in bolstering the local community once again in order to restore and rejuvenate that social and economic growth.

#### 2.4 Objectives (for the 2019 Year)

- Complete deconstruction of all false rooms on building's second floor.
- Complete subflooring removal of building's west side first floor.
- Complete deconstruction of all false rooms on building's east side first floor.
- Complete subflooring removal of building's east side first floor.
- Complete subflooring removal of building's north side first floor (first addition).
- Complete removal of drop ceiling framework and fastening of fluorescent lights on building's first floor.
- Complete grant proposals for a minimum of three private sector foundation grants, including WPS Foundation, USDA, and Hamilton-Roddis Foundation.
- Obtain at least three quotes for architectural renderings of reconstructed building.
- Obtain at least three quotes for total replacement of electrical, HVAC, and plumbing systems.
- Complete total replacement of original structure's roof, including skylights and gutters.

#### 2.5 Mission & Values

***The mission of Maple Place is to restore, preserve, and maintain the history and historic structure of the Connor Lumber and Land Company Store and maintain its importance and significance with regard to economic progress, quality of life, and preservation of the history within the Laona community.***

Core Values:

- Community Commitment – Build respectful relationships within the local community that cultivate trust
- Historic Commitment – Restore, preserve, and maintain the historic significance and integrity of the former Connor Lumber and Land Company Store and its cultural, historic, and economic impact to the community
- Quality – Provide the highest level of quality services and maintenance to not only the historic building but for prospective occupants and the community as well

- Financial – Commit to financial goals that maximize allocated funding in order to support our values and bolster the community
- Community Dedication – Build and provide a space, both interior and exterior, that the community can both utilize and be a proud part of

## 2.6 Building, Layout and Design

- Building Size
  - The current building overall measures roughly 98’ wide by 200’ long, with a total square footage of almost 30,000 square feet
    - The second addition to the building’s first floor, which includes a portion of the old grocery store, the loading garage, and the deli kitchen, is anticipated to be removed and replaced with a courtyard and community gardens to provide green space and additional parking/thoroughfare access to traffic, both vehicular and foot.
  - The original building measures roughly 12,000 square feet per floor
    - 2 floors, plus full basement space
  - The first addition to the first floor’s north end (which is being kept) measures roughly 2,000 square feet
- Building Layout/Design
  - Exterior
    - The exterior of the original building is of brick and mortar construct, including concrete sills above and below the original windows and a concrete cornice separating first floor from second floor and second floor from roof; the building’s roof also sports a parapet wall on its south, west, and north sides. The original building is considered a vernacular and utilitarian construct, similar to many industrial buildings of its time, but with a bit of decorative flair. The original building exterior is very symmetrical and simple in design.
  - Interior
    - First Floor
      - The first floor of the building was originally divided into three separate sections: west, central, and east; each section provided its own entrances/exits, basement stair accesses, and second floor stair accesses. Currently, the first floor is open-concept with the restoration work.
      - The first floor shows remnants of some of the building’s original design components, mostly in the form of tin ceiling portions that have been found under the false ceilings.
      - The east side of the building features an original freight lift that runs service from basement to second floor.
    - Second Floor

- The second floor of the building features roughly half of the building's north and east side occupied by a ballroom space of about 6,000 square feet. The L-shaped offices and bank vault that occupy the west and south sides of the second floor make up about 6,000 square feet also.
- The second floor also features a great deal more of the building's original design components, including doors, transom windows, skylights, mouldings (including picture rail, chair rail, and baseboard), and tin ceilings.
- The east side of the building features an original freight lift that runs service from basement to second floor.

## 2.7 Construction

- Companies Providing Work:
  - Demerath Masonry
    - Preliminary talks are being held with Demerath Masonry regarding the building's exterior. The primary work to the building's exterior includes:
      - Brick repair.
        - Bricks on the east side wall of the building that have been damaged due to weather and/or age will be replaced with historic replicas.
      - Re-opening and re-framing of windows.
        - Original windows on the building's west and east sides have been bricked over; these bricks will be removed and reused, and the windows will be re-opened to original sizes.
      - Reconstruction of south side first floor exterior.
        - The exterior of the building's front (south side) wall has been drastically altered from its original components; this front section will be replaced and restored to include the building's original façade elements:
          - Exposed brick columns.
          - Large picture windows.
          - Leaded glass small squares transom windows.
          - Replacement of the concrete cornice separator between first and second floors, extending into the west side wall of the building as well (ending above the original doorways on the west side).
  - Gary's Welding and Home Repair
    - Gary Krause of Antigo, Wisconsin has provided repair work for the building reconstruction in 2018; he performed repairs to the leaks in the roof in order to prevent additional damage to the



- building until the roof could be completely replaced; he also repaired the gutter and downspout system to better expel water and prevent additional damage to the building's east side wall and bricks.
- Gary is also in process of providing a quote for the complete replacement of the roof; this replacement will also include the repair and replacement of the two original skylights.
  - Hocker Bros. Brick Company
    - The Hocker Brothers Brick Company provided some of the original bricks in the building's 1914 construction; they currently participate in providing historic replica bricks and have been preliminarily contacted regarding providing replacement bricks for both the exterior and interior repairs to the building.
      - This presents a unique opportunity in the fact that Hocker Bros. Brick Company provided much of the original bricks to build the 1914 building.
  - WD Flooring
    - Jennifer Connor is in process of speaking with WD Flooring to provide quotes for repairs and restoration to the original hardwood flooring on both the first and second floors of the building.
      - This, like with Hocker Bros., provides a unique opportunity, as the original existing floors that were installed by the Connor Lumber and Land Company could be repaired and restored again by members of the same family; WD Flooring is also owned by the Connor family.
  - Other Companies
    - Maple Place Inc. is still actively seeking construction companies that will provide quotes for the following components:
      - Architectural renderings.
      - Electrical systems.
      - HVAC systems.
      - Plumbing and sprinkler systems.
      - Windows.
      - Window well replacements/sidewalk replacements/gravel or blacktop parking lot and thoroughfare replacements.
      - Elevator purchase and installation.
      - Building insulation.
      - Tin ceiling reproduction, replacement, and installation.
      - Plaster and lathe removal and drywall replacement.
  - Construction Timeline:
    - The entirety of the building restoration project is projected to take between 5-7 years to fully complete, dependent upon financing and grant allocations.
      - Years 1-3 are anticipated to be income- and resource-gathering years, as well as having any restoration work be performed on a volunteer basis.

- In 2018 (year 1 of the project) currently, nearly 2/3 of the first floor original flooring has been re-opened; the building owner is handling this removal personally.
  - The building owner has been working on demolition and removal since May of 2017, when all of the false rooms on the building's first floor central and west sides were removed.
- In 2019 (year 2), our construction timeline is as follows:
  - Complete removal of subflooring on building's west side first floor.
  - Remove false walls and rooms from building's east side first floor.
  - Remove subflooring on building's east side first floor.
  - Finish removal of all drop ceiling framework structure from first floor ceiling and individually secure all fluorescent fixtures.
  - Complete removal of false rooms on building's second floor.
  - Allocate funding to perform a complete replacement of the original building roof, skylights, and gutter system.
    - Complete roof replacement, including skylights and gutter system.
  - Compile quotes for the following:
    - Architectural renderings
    - Electrical system
      - Focus on energy efficiency, including exploration of solar panel system for the building roof
    - HVAC system
      - Focus on energy efficiency and cost effectiveness for forced air and installation throughout building
    - Plumbing system
    - Flooring repair/replacement
    - Single-person ADA-compliant elevator purchase and installation
    - Restructuring of building's first floor south side, including brickwork, transoms, doors, and windows
    - Repair to brick work on west and east sides of the building, including re-opening and replacement of original doors, window casements, and glass
    - Removal of north side building addition
    - Rebuild and restructure of building's north wall post-addition removal, including brick work, doors, window casements, and glass

- Additional work projected for 2020 may be performed in 2019 as both funding and time allow.
- In 2020 (year 3), our construction timeline is as follows:
  - Review anticipated building plans for restored building layout with historic architect; purchase architectural renderings of said building blueprints, including projected electrical, plumbing, HVAC, and sprinkler systems.
  - Repair all exterior brick damage to west and east sides of the building.
  - Replace entirety of plumbing system, including installation of a brand-new sprinkler system.
  - Replace entirety of electrical system, including installation of solar panels on the building's roof.
    - This will also require replacement of all lighting and light fixtures on the building's first floor and portions of the building's second floor, keeping styles as close to the original building's fixtures as possible
  - Replace entirety of HVAC system, including an energy-efficient furnace.
    - HVAC system will be reworked to blend into rooms rather than sticking out or having to be covered up with false ceiling
  - Reopening of original windows on building's east and west side first floors.
    - This will include replacement of window casements, rope-and-pulley systems, concrete sills, and energy efficient glass for both windows and accompanying transoms
- In 2021 – 2024 (years 4 through 7), our construction timeline is as follows:
  - Demolition of building's north side addition.
  - Reconstruction of north side wall, including bricks, doors, window casements, transoms, and glass.
  - Replacement of roof on building's north side original addition.
  - Replacement of south and west sidewalks, reopening/grating/drain tiling of west and east basement window wells.
    - Replacement of window casements and glass of basement windows.
  - Construction of courtyard and community gardens on building's north side.
  - Replacement of blacktopping/graveling on building's north and east side parking lots/thoroughfare areas.

- Installation of single-person ADA-compliant elevator and accompanying handicap-accessible entrances and exits.
- Reconstruction of interior building rooms on first and second floors.
  - Includes installation/replacement/repair of fixtures, trim, doorways and transoms, and flooring.

### 3.0 Programs, Products & Services

#### 3.1 Programs

- Currently, we do not offer any programs through Maple Place Inc.

#### 3.2 Products

- Currently, we do not offer any products through Maple Place Inc.

#### 3.3 Services

- Currently, we do not offer any services through Maple Place Inc.

### 4.0 Market Analysis<sup>123</sup>

#### 4.1 Target Market Demographics and Characteristics

- Geographical location
  - The building's physical location is at 4894 Mill Street, Laona, Wisconsin, 54541, county of Forest.
  - The building is anticipated to serve and represent communities ranging from as far south as Green Bay, Appleton, Wausau, and Oshkosh, and as far north as the upper peninsula of Michigan; for the purposes of this current business plan, however, we will focus specifically upon the demographics of Laona.
- Population of Laona (# of families, youth, teens, elderly)
  - As of the [census<sup>\[2\]</sup>](#) of 2000, there were 1,367 people, 564 households, and 395 families residing in the town of Laona. The [population density](#) was 13.2 people per square mile (5.1/km<sup>2</sup>). There were 850 housing units at an average density of 8.2 per square mile (3.2/km<sup>2</sup>). The racial

<sup>1</sup> <https://datausa.io/profile/geo/laona-wi/>

<sup>2</sup> [https://en.wikipedia.org/wiki/Laona,\\_Wisconsin](https://en.wikipedia.org/wiki/Laona,_Wisconsin)

<sup>3</sup> <https://suburbanstats.org/population/wisconsin/how-many-people-live-in-laona>

makeup of the town was 95.90% [White](#), 0.44% [African American](#), 2.41% [Native American](#), 0.07% [Asian](#), 0.07% from [other races](#), and 1.10% from two or more races. [Hispanic](#) or [Latino](#) of any race were 0.37% of the population.

- In the town, the population was spread out with 26.1% under the age of 18, 5.9% from 18 to 24, 26.0% from 25 to 44, 23.2% from 45 to 64, and 18.8% who were 65 years of age or older. The median age was 40 years. For every 100 females, there were 92.8 males. For every 100 females age 18 and over, there were 91.3 males.
- Income levels
  - The median income for a household in the town was \$31,852, and the median income for a family was \$41,042. Males had a median income of \$29,674 versus \$21,154 for females. The [per capita income](#) for the town was \$15,652. About 8.7% of families and 11.2% of the population were below the [poverty line](#), including 14.7% of those under age 18 and 6.2% of those age 65 or over.
- Client or customer lifestyle & Household size
  - There were 564 households out of which 32.1% had children under the age of 18 living with them, 57.1% were [married couples](#) living together, 9.6% had a female householder with no husband present, and 29.8% were non-families. 27.1% of all households were made up of individuals and 13.1% had someone living alone who was 65 years of age or older. The average household size was 2.42 and the average family size was 2.91.

## 4.2 Market Focus

- Target Audiences
  - Our target audience for marketing will be 100% men and women, ages 18 to 65+.
    - Of that group, roughly 50% of our target audience for sponsorships and donations will be men and women ages 35 to 55; roughly 25% from men and women ages 56 to 65; and roughly 25% from men and women ages 66+.
- Strategies to attract target audience
  - Social Media
    - Facebook has largely been our current marketing and advertising platform during the building's restoration progress to keep the community engaged, involved, and interested in the building progress.
      - Maple Place Inc. posts regularly after any building work days to keep audiences engaged in the progress through photos, videos, and text.
        - Side-by-side photos of restoration progress from last August (2017) and this August (2018) were

recently added to give audiences a view of current progress made.

- Timeframe for capturing target audience
  - Our timeframe for capturing our target audiences is perpetual.
    - Both active engagement and patronage/sponsorship is intended as perpetual.

## 5.0 Management and Organization

### 5.1 Management team

- The Maple Place core management team is composed of the board of directors, which currently numbers 11 individuals; aside from the board of directors, Maple Place Inc. does not have members. The board of directors may have up to 15 director seats.
  - Ten of the eleven occupied seats are voting directors; the eleventh seat is a non-voting, honorary position (Historic Advisor).
  - The board of directors may have as few as 7 and as many as 15 board seats.
  - The board's officer positions consist of the Chair/Executive Director, Vice-Chair, Secretary, and Treasurer.
- The following are currently-occupied positions and descriptions:
  - Chair/Executive Director.
  - Vice-Chair.
  - Secretary.
  - Treasurer.
  - Grant Development Director.
  - Marketing Director.
  - Botanical Director.
  - Decoration Director.
  - Historic Advisor.
- Board of director individuals' qualifications and years of experience.  
**[INCOMPLETE]**
  - Phillip J. Adamczyk. Phillip J. Adamczyk (Wabeno, Wisconsin) is the Executive Director and current Chair of Maple Place Inc. Phil is a licensed massage therapist and the owner of Amoterra, a wellness center based in Townsend, Wisconsin, and has run his own business since 2013. He has had experience in education, health and wellness, business, accounting, and organizational management since 2009, having run and managed a holistic wellness center in La Crosse, Wisconsin while completing his Bachelor of Science in secondary English and history education from the University of Wisconsin-La Crosse. Phil

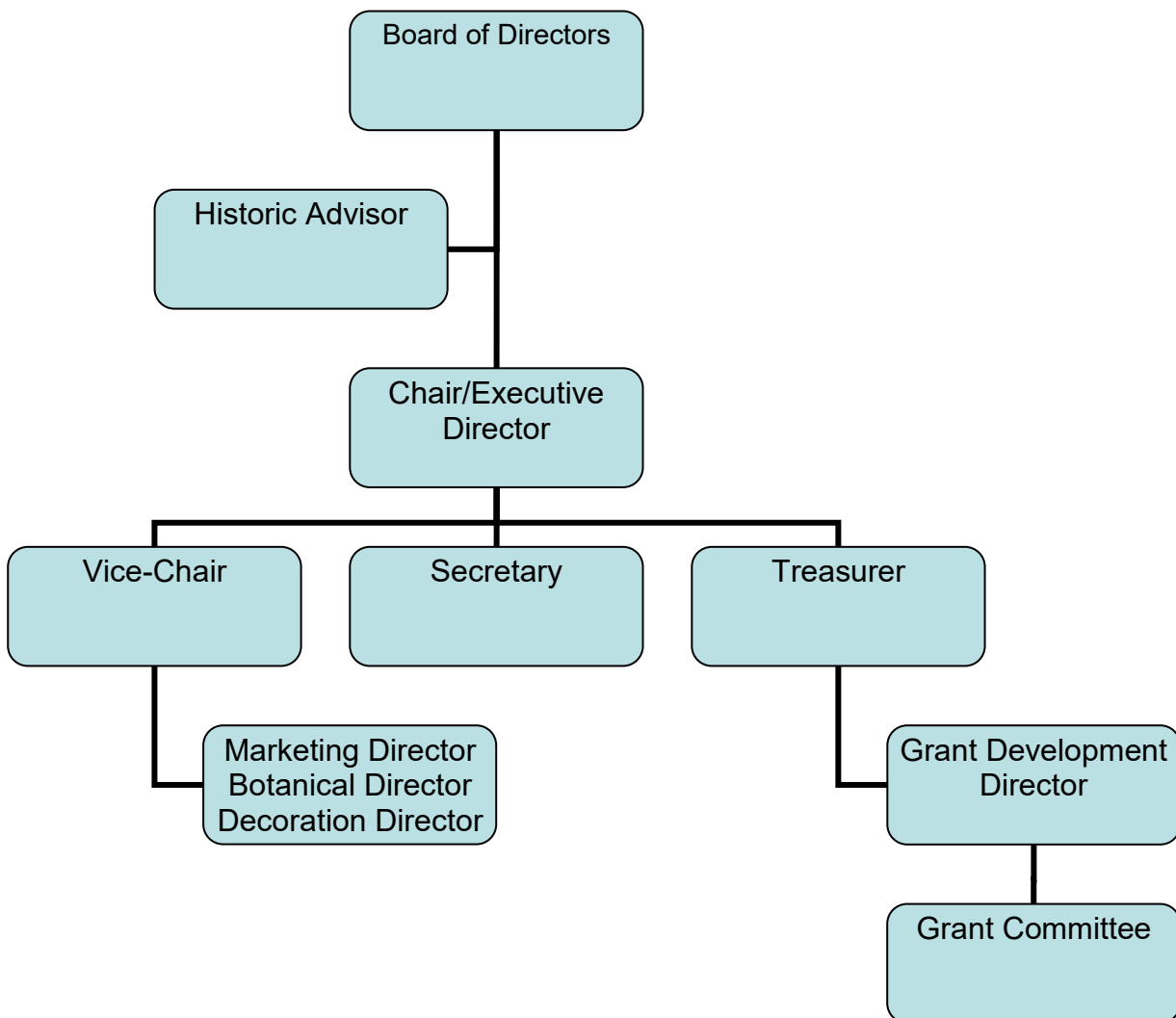
- also serves as the secretary and treasurer of the Laona Area Chamber of Commerce. Phil brings to the table his skills in education and educational development, secretarial organization and bookkeeping, business organization, business management, accounting and finances, and interpersonal communication, as well as his knowledge of technology, information systems, marketing and advertising, and social media communication. Phil's passion for history and desire for community-mindedness, as well as his dedication to economic and social development, drive him to constantly seek to better himself, others, and the communities of which he is a part.
- Richard Schaal. Richard Schaal (Mountain, Wisconsin) is a retired army veteran, teacher, consultant, and former principal with the Green Bay Area Public School system, and a retired administrator from the University of Wisconsin - Green Bay. Richard's skills include communication, questioning, goal development and assessment, organization, and community building development.
  - Helen Schaal. Helen Schaal (Mountain, Wisconsin) is the Maple Place Inc. Secretary, an adjunct instructor and university supervisor with the University of Wisconsin-Green Bay (student teachers), and has worked with staff development, brain-based learning, and leadership development for many years. Helen's skills brought to the table include excellence in relationship-building, interpersonal relationships, and diverse methods of communication.
  - Jonel Calhoun. Jonel Calhoun (Laona, Wisconsin) has spent a lifetime in the banking industry, from customer rep to lender, branch management, compliance officer and internal audit. Her strengths are in finance, regulatory compliance, policy-procedure- and report writing, and pretty much anything that requires attention to details. Jonel is also currently serving as the Maple Place Inc. Grant Development Director and is in charge of management of the grant committee and stewardship of all grants awarded.
  - Kristopher Tryczak. Kristopher Tryczak (Wabeno, Wisconsin) is the Decoration Director, a small business owner and interior designer since 2010, and has previously worked in historic restoration as part of the preservation team to restore the National Registry of Historic Places-listed Yawkee House in Wausau, Wisconsin (2008-2010). Kristopher brings to the table his knowledge of period-specific historic design with regard to appropriate time period, as well as his knowledge of architectural design for both blueprinting and building construction and design.
  - Rosalyn Wittmann. Rosalyn "Roz" Wittmann (Townsend, Wisconsin) holds a master's degree in organizational leadership and a bachelor's degree in public service leadership. Roz is also a retired police officer

- who worked as a community liaison officer. Roz has also worked in grant development, helping acquire grant funding for summer programs for at-risk youth; in addition, she has helped to foster community partnerships through spearheading programs such as Fox Crossings in Menasha, the GREAT summer program, community Citizenship Government Academy, and more. Roz has also worked as an adjunct instructor through Fox Valley Technical College.
- Sheri Jo Posselt. Sheri Jo Posselt (Townsend, Wisconsin) is a local artist, small business owner, and entrepreneur who brings to the table a unique perspective in right-brain creation, ideas, and foresight. She has the ability to “see the finished product” and is also able to express it in representation of drawings, signs, and other creations. Sheri Jo also brings with her the trade skills of sketch art, carpentry and measurement, and architectural rendering.
  - Joshua Jameson. Joshua Jameson (Argonne, Wisconsin) is committed to serving his community in all aspects from the arts, small businesses, economic development and adult education. He works in educational business finance and does consulting in community development. When not working he enjoys music, theater and travel. He resides in Argonne on his “family homestead.”
  - Carla Connor. Carla Connor (Laona, Wisconsin) has worked with interpersonal communication, in-person social networking, volunteerism, community betterment, and community development as a private citizen for many years. Her skills include interpersonal communication, landscaping, interpersonal networking, and “street smarts” know-how. Carla is a “jack of all trades,” able to apply her skills in manual construction and labor as much as her skills in social interactions. She is actively involved in a multitude of volunteer organizations, all of which support community development, preservation, and interconnectedness.
  - Jennifer Connor.
  - Debra Draheim. Debra Draheim (Shawano, Wisconsin/Lakewood, Wisconsin) began her career in the healthcare field in 1998 through implementation of in-home day programs for individuals with developmental disabilities and has always had a passion for helping others. Deb is a business owner and entrepreneur, having helped to create a nonprofit called “Independent Journeys Inc.,” which helps facilitate independent home living, active community participation, and personal enrichment for developmentally disabled individuals. In addition to her previous and current experience with administrative duties, Debra serves as Operations Coordinator, HR Specialist, and board of directors secretary for Independent Journeys Inc.; she has experience in secretarial work and finances through both the nonprofit corporation and through co-management of her husband’s businesses, as well as



managerial skills with regard to rental properties. Debra also has experience in landscaping and interior design work. In addition to all of her business-based skills, Debra also brings to the table her interpersonal skills in spiritual-based consultation, helping to empower individuals, assist in self-achievement and self-fulfillment, and promote clear and communication among individuals, as well as self-communication and understanding. Debra is looking forward to the future and is excited for all the possibilities and ways in which she can serve and contribute to her community, hoping to bring about a positive change in any way possible and sharing her favorite motto as often as she can: “kindness is free – pass it on.”

- Sara Connor. Sara Connor (Laona, Wisconsin) is the Maple Place Inc. Historic Advisor, a retired educator, and has worked in both the fields of education and historic preservation for over 20 years. Sara is both an accomplished author and historian, bringing to the table her experience and expertise in local and family history with regard to both the building’s and community’s preservation of history.



## 5.2 Staffing

- Maple Place Inc. is currently composed solely of volunteer staff, which includes the board of directors and any volunteer workers.
  - Any paid contractors will report directly to the Chair/Executive Director, who will then report to the board of directors.
- Monthly Personnel Expenses
  - There are currently no projected monthly expenses for personnel.

## 6.0 Community Development

- Our organization (Maple Place Inc.) pledges to:
  - Create at least 15 jobs for contractors
  - Create at least 30 jobs/positions through our incubator projects
  - Create local construction jobs during site preparation and new building construction
  - Support the environment by constructing a green building that uses solar panels, skylights, cisterns, and recycled box materials, making it more energy efficient and environmentally friendly
  - Source from local suppliers when possible
  - Promote education and awareness on local history and historic preservation with regard to the Laona community
  - Promote residential development
  - Support smaller enterprises through business partnerships and alliances
  - Build loyalty and contribute to a sense of community among local residents
  - Have a long-lasting, positive impact on the area

## 7.0 Strategy and Implementation

### 7.1 Marketing Strategy Overview

- Goals and Objectives: **[INCOMPLETE]**
  - Maple Place Inc.'s overall goals and objectives are to complete the restoration and preservation of a historic building which will offer a central, community-based location for the Laona and surrounding communities.
    - Our primary goal with regard to this is
  - Our secondary goals involve creating a temporary incubator space for an assortment of businesses, products, and services, all of which will provide additional opportunities for community growth and economic development, as well as preservation and growth of the immediate local community.
- Key Milestones:

○

## 7.2 Marketing Tactics

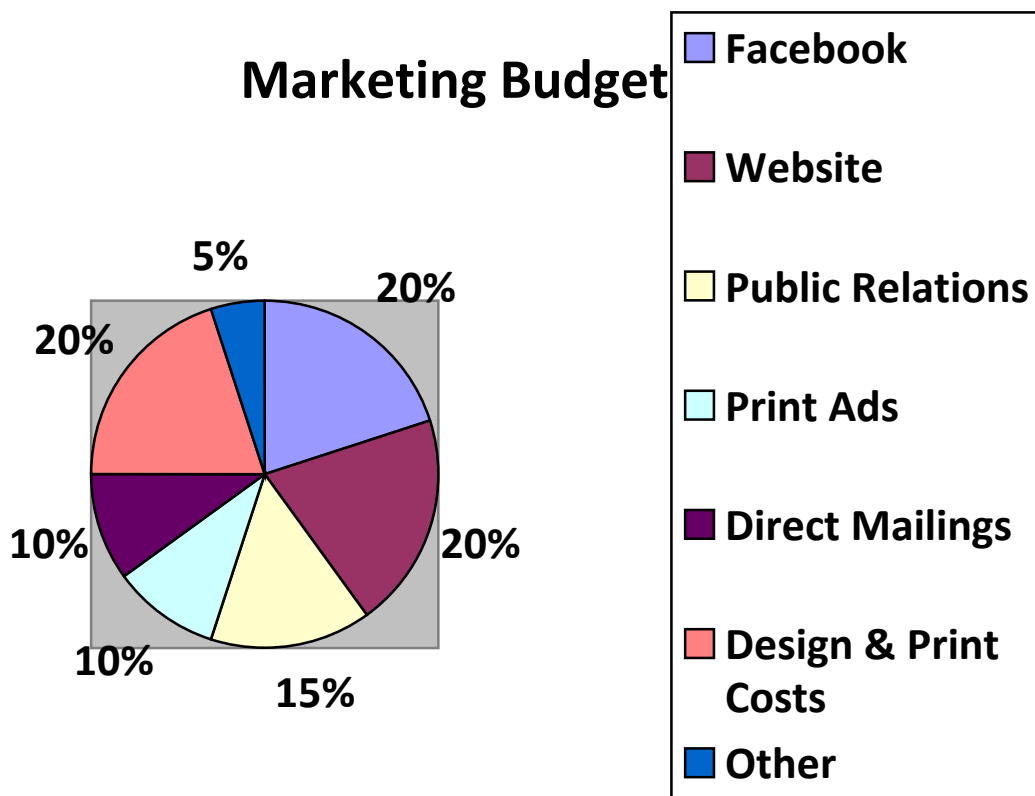
- Logos
  - The Maple Place Inc. logo will be displayed on all legal and official materials, letterheads, mailings, etc.
- Slogans
  - Our primary slogan is “The Cornerstone of Historic Laona.”
- Customer Surveys
  - Maple Place Inc. will build customer surveys sampling a want of products and services in the local and surrounding areas.
    - Focuses will be on history, education, health and wellness, and both essential and non-essential services and products (e.g., coffee, bakery, village post office)
- Print Advertisements
  - Print advertisements will be limited until additional funding is secured.
- Public Relations
  - All board of directors members actively engage the public in discussions on the building’s restoration work, including approaches to donors for sponsorships and contribution requests.
- Cold Calling
  - For the time being, cold calling is reserved exclusively for prospective individuals and organizations being petitioned for financial contributions and potential grant funding.
- Social Media
  - Facebook is primarily our means of social communication, including regular posts and photos of restoration progress.
  - Maple Place Inc. also has a functioning website with projected project outcomes and enables visitors to donate directly to the project through PayPal.
  - Web and Email marketing.
    - Our website contains a blog section that keeps audiences up-to-date on our progress.
    - Once further along in restoration, we plan to begin a mailing list with a regular newsletter.

## 7.3 Marketing Budget

- Our marketing is currently focused primarily online, via our website and Facebook. We are currently working with an extremely small overall budget, so

most of our marketing budget is non-existent and is currently being covered by the Chair/Executive Director. Once our project is further along, we intend to begin with a base budget of \$5,000.00 and allocate and distribute our marketing finances into the following areas:

- Facebook (20%, \$1,000.00)
  - Will include other social media as well, but primarily Facebook
- Website (20%, \$1,000.00)
  - Includes domain registrations, events calendar purchases, design services, and more
- Public Relations (15%, \$750.00)
- Print Ads (10%, \$500.00)
- Direct Mailings (10%, \$500.00)
- Design & Print Costs (20%, \$1,000.00)
- Other (5%, \$250.00)
  - May include items such as radio and television broadcasts or commercials



#### 7.4 Fundraising Strategy

- Our Fundraising Strategy employs two main approaches:
  - All board members.

- All board members actively participate in social engagement with the community regarding talking about the building project and what is required.
      - All board members actively solicit contributions in person and through their contacts and communications as is appropriate.
    - Grant Committee and Grant Development Director.
      - The Grant Committee is responsible for solicitations to public and private sector foundations, as well as research, allocation, drafting, and submission of grant proposals.
      - The Grant Development Director is in charge of relationship-building with foundations, patrons, sponsors, and donors and is also in charge of stewardship management of all grants and contributions.
  - Our Fundraising Strategy will target the following areas:
    - Patrons/Sponsors/Investors
      - Cash donations, service donations, supply donations
    - Public Foundation Sector
      - Grants for the following areas:
        - Primary systems
          - Electric
            - Energy efficiency/solar panels
          - Plumbing
          - HVAC
            - Energy efficiency
        - Renovation
    - Private Foundation Sector
      - Grants for the following areas:
        - Primary systems
          - Electric
            - Energy efficiency/solar panels
          - Plumbing
          - HVAC
            - Energy efficiency
        - Renovation
  - Project Cost and Breakdown
    - The total cost of the building restoration project is projected at an estimated 1.6 million dollars.
      - Primary systems are estimated to cost a total of \$500,000.
        - Plumbing (not including sprinkler system) is estimated at \$100,000.
          - Sprinkler system replacement is estimated at \$50,000.
        - Electrical is estimated at \$250,000.
          - This includes a complete rewiring and updating of the building, including both original freight elevator and installed single-person ADA-compliant elevator; cleanup and removal of all old and unused boxes and electricals; and

replacement of fluorescent light fixtures with period-specific non-fluorescent fixtures.

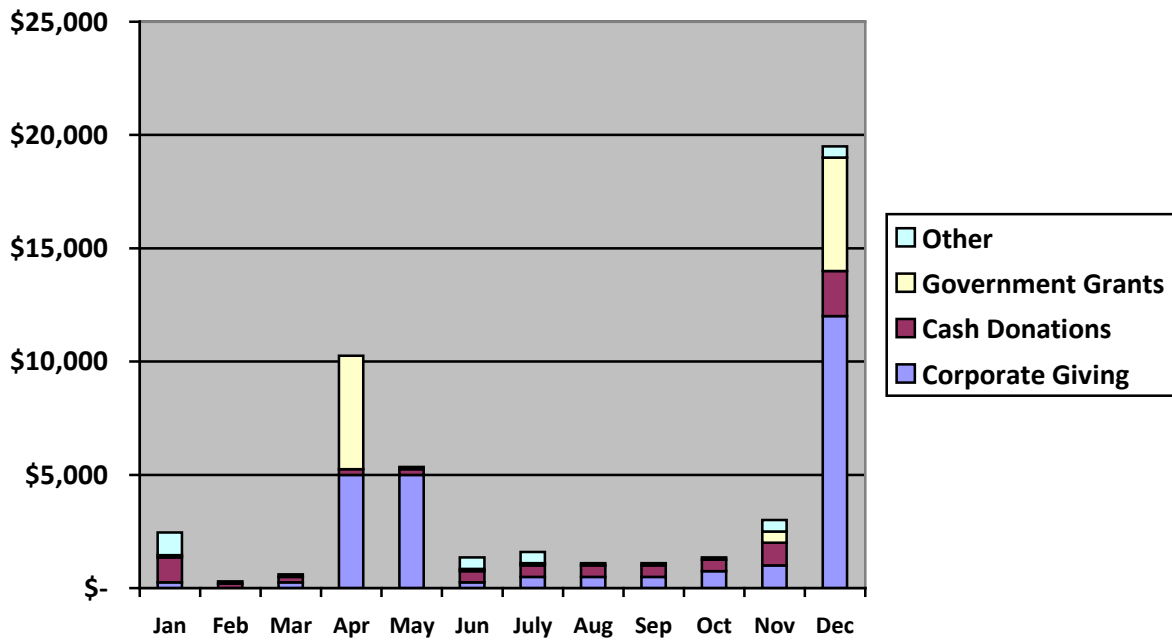
- HVAC is estimated at \$100,000.
- Exterior restoration and restructuring of the building is estimated at \$500,000.00.
  - This includes replacement of all windows, casements, concrete sills, and transoms; doors and frames; replacement of concrete cornice curbing on south and west sides, separating first and second floors; repair to brick damage, restructuring of south side's first floor, and rebuild of north side's first floor; re-opening, grating, and drainage for basement window wells on east and west sides, including windows and casements; complete replacement of roof, skylights, and gutter/downspout systems; and replacement of west and south sidewalks, as well as north parking lot and east parking lot/thoroughfare.
- Purchase and installation of single-person elevator, as well as updating for handicap accessibility.
  - Elevator purchase and installation: \$25,000.
  - Updates to entrances and exits, including electricals for handicap accessibility: \$5,000.
- Construction and implementation of courtyard and community gardens.
  - Courtyard estimated cost: \$20,000.
  - Gardens estimated cost: \$5,000.
- Interior reconstructions
  - Blueprints: \$3,000.
  - Tin ceiling reconstruction and replacement: \$25,000.
  - Reconstruction of rooms, including walls, doors, and all trim: \$25,000.
  - Building furniture and room furnishings: \$100,000.
  - Commercial/Industrial grade caterer's kitchen (second floor), including all furnishings: \$10,000.
  - Additional aesthetics: \$25,000.
    - This would include items such as paint, additional trim, etc.
- Fundraising monitoring and stewardship process
  - Grant Committee and Grant Development Director.
    - The Grant Committee and Grant Development Director are in charge of funding resources that come from the public and private sectors. They are in charge of researching and applying for qualifying grants from both public and private foundations.
      - All members of the Grant Committee perform research and application and report directly to the Grant Development Director.
        - The Grant Development Director oversees all grant applications and stewardships and reports

regularly to the board of directors. This is evaluated at least once per quarter, or more often as deemed necessary by the board of directors.

7.5 Sales/Funding Forecast

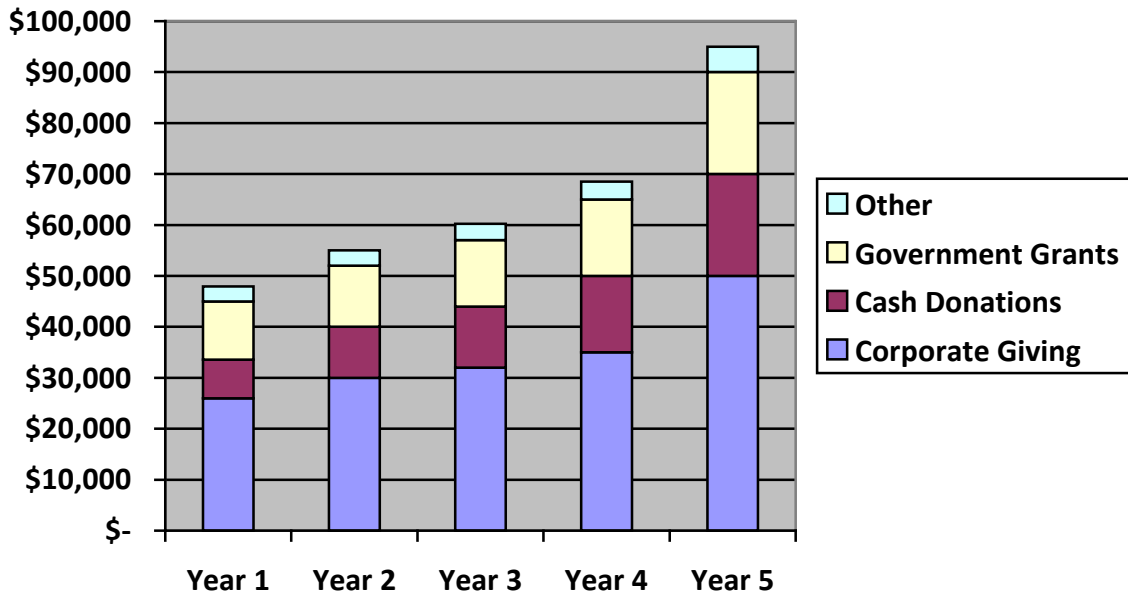
- Following is a graph which projects an estimated monthly sales/funding forecast for the first year of operation of Maple Place Inc.

### Year 1 Monthly Fundraising Forecast



- Following is a graph which projects estimated annual sales/funding forecasts through year 5 for Maple Place Inc.

## Annual Fundraising Forecast



### 8.0 SWOT Analysis

#### 8.1 A SWOT Analysis

- The existing potential strengths, weaknesses, opportunities, and threats for Maple Place Inc. are illustrated in the following chart:

*Overcome weaknesses to pursue opportunities*

<i>Pursue opportunities that fit with strengths</i>	<p><u>Strengths</u></p> <ul style="list-style-type: none"> <li>Central location in community</li> <li>Community based employees</li> <li>Focus on local historic preservation</li> <li>High quality operational procedures</li> <li>Location in heavy traffic area</li> <li>Unique programs and services</li> <li>Complimentary transportation</li> </ul>	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> <li>Location in lower population area</li> <li>Limited marketing resources</li> <li>Poor community reputation</li> <li>Establishing awareness in community</li> <li>Lack of community involvement</li> </ul>	<i>Establish a defensive plan to minimize threats</i>
	<p><u>Opportunities</u></p> <ul style="list-style-type: none"> <li>Partnerships with community</li> <li>Partnerships with other nonprofits</li> <li>Partnerships with local organizations</li> <li>Unmet demand for programs and services</li> <li>Community involvement &amp; support</li> </ul>	<p><u>Threats</u></p> <ul style="list-style-type: none"> <li>Ability to maintain and secure on-going funding</li> <li>Potential population decreases</li> <li>Income and poverty levels within local community</li> <li>Decrease in volunteer participation</li> <li>Similar services or programs</li> </ul>	



## 8.2 SWOT strategies

- How Maple Place Inc. will use our strengths to overcome our weaknesses:
  - Being at the center of the Laona community and in a very heavy traffic commute area (directly adjacent to State Highway 8), we are in a prime location for advertising and for drawing interest from both local community members and passersby. Being that Maple Place Inc. also represents one of the only remaining historically-intact buildings in Laona, we plan to also utilize the historic aspect of the preserved and restored building as a tool in marketing and economic progress, as well as community pride and community-mindedness for preservation not just of local history and structures but also preservation of the sense of community.
  - Being that Maple Place Inc. is also in an area of lower local population and largely community un-awareness, we plan to implement programs, talks, and seminars focused on community development, community action and preservation, and preservation of local historic sites in order to educate and bring awareness to the larger local - and, as a result, surrounding - communities.
- How Maple Place Inc. will capitalize on opportunities to mitigate threats:
  - The largest threat to our organization by far is loss of funding or lack of funding; Maple Place's board of directors, as well as its grant development director and corresponding grant committee, will actively foster and maintain relationships within the community, including with local businesses and organizations, to maintain an ongoing relationship.
    - Maple Place's grant committee's work in research and grant applications is perpetual and ongoing; the grant committee is dedicated to securing ongoing contributions through qualifying grants and grant programs.
    - The board of directors is dedicated to fostering and maintaining continual relationships with current donors by providing samples of what donor funds have purchased, as well as giving donors the ability to stay abreast of project developments by being informed participants.
  - Many of the local community business components, as well as other nonprofits, stand to benefit from community awareness and participation as much as Maple Place Inc. does; therefore, it is advantageous for local businesses, nonprofits, and organizations to network and participate in order to increase awareness of programs and services as well as garner additional support from peer organizations and from the local communities that these businesses/organizations/nonprofits serve.
    - A potential threat to Maple Place Inc. is the existence of programs or services that may be similar to those we anticipate offering; a strategy to prevent this being an issue is to network with the organizations offering similar services or

programs to provide a collaborative, community-minded approach.

- In providing a restored space for business incubation, Maple Place Inc. is providing the opportunity to the local community to increase income as well as increase population growth/economic growth while also providing the opportunity for programs and services that the area lacks.
- Volunteer participation is an ongoing issue with many nonprofit organizations; Maple Place Inc. will help garner support and encouragement in volunteer participation by offering small appreciation perks to volunteers, such as banquets, certificates of appreciation, and discounts on products or services with which Maple Place Inc. is affiliated.

## 9.0 Operations

### 9.1 Organization Model

- All day-to-day operations of Maple Place Inc. are headed by the executive director; the executive director reports regularly to the Maple Place board of directors.
- Finances, including incomes and expenses, as well as grants, are headed by the treasurer, who reports regularly to the Maple Place board of directors.

### 9.2 Hours of Operation

- Maple Place Inc. currently has no hours of operation. Projected hours of operation once the building is complete will be Monday through Friday, 7:00 AM - 9:00 PM; Saturday and Sunday 7:00 AM - 5:00 PM; closed all major holidays; and special closings as posted.
  - Hours of operation for individual businesses located within the building may differ from building hours of operation.

### 9.3 Systems, Equipment and Software

- Systems needed:
  - Surveillance/security systems
  - Alarm systems
  - Automatic lock systems
- Equipment needed:
  - Surveillance/security cameras
  - Surveillance computer system
  - Automated locks and computer system
  - Alarms and computer system
  - Fire extinguishers

- Exit signs, fire notices, building safety postings
- Software needed:
  - Surveillance and security
  - Alarm monitoring (ADT or equivalent)
  - Automated locking system software
- Estimated cost for all software, equipment, and systems dealing with surveillance/security/alarms/automated locks, including installation and monitoring: \$15,000.

#### 9.4 Employee Training and Development

- Currently, the only training Maple Place Inc. offers is course registrations through the Fundraising Authority for grant writing and fundraising; these courses are available for free to all board members interested in said subjects and are required for the grant committee members.

#### 9.5 Facilities

- Maple Place Inc. will be a community-based facility that will provide a variety of businesses and services throughout the building. Here is a brief overview of the facility and its anticipated components within:
  - First Floor
    - Central corridor with living history museum display (central hallway running North-South).
    - Coffee shop and bakery (South-Southwest side of the building).
    - Laona Area Chamber of Commerce and visitors' center (South-Southeast side of the building).
    - Laona Historical Society (West-Central side of building, inside old bank vault [3 stories]).
    - Amoterra University of Restorative and Healing Arts [AURHA] (Classrooms on West and East sides of building; student clinic North-Northwest side of building).
    - Public restrooms (Central - off the central corridor's west wall).
    - Information and registration office (Central - off the central corridor's east wall).
    - Elevator (Central - off the central corridor's east wall).
    - Basement stair access and 2nd floor stair access are accessible in each west, east, and central portion of the building.
    - Entrances and exits may be found on all four sides of the building; each is handicap-accessible.
  - Second Floor
    - 1st floor stair access is accessible in each west, east, and central portion of the building.

- Elysium Ballroom, rentable for community events and usable by occupied businesses; Maple Place Inc. also will utilize this space for events, classes, and more (North-Central-Northeast side of the building).
- Elevator (Central-East, between the Ballroom and the public restrooms).
- Public restrooms (Central-East, accessible from Ballroom and from elevator).
- Kitchenette/Caterer's Kitchen, rentable for community events and usable by occupied businesses (North-Northwest side of the building).
- AURHA Event Director and Coordinator's office (North-Northwest side of the building).
- Storage closet (West side of the building).
- AURHA Dean and Associate Dean's office (West side of the building, next to the west staircase access).
- Laona Historical Society (West-Central side of the building, inside old bank vault [3 stories]).
- AURHA student library (West side of the building, next to the west staircase access).
- Private restroom (West side of the building, accessible to patrons and practitioners of the Maple Place Inc. Wellness Center).
- Employee/Staff/Wellness Center offices (Southwest-South-Central-Southeast sides of the building).
- Southeast staircase access to Wellness Center (Southeast corner of the building, direct access from outside to 2nd floor).
- Exterior
  - Courtyard and Community Gardens (North side of the building).
  - South and West sidewalks.
  - North side and East side parking; Southeast side parking will also include parking access for ATVs and snowmobiles, as East side access abuts the ATV/snowmobile trail.

#### 9.6 Suppliers and Distribution

- Maple Place Inc. currently has no suppliers or distributors.

## 10.0 Financing Requirements

### 10.1 Total Capital Requirements

- Our organization requires an estimated \$1.6 million dollars in capital to complete our restoration project and start up the building as a functioning element.
- All capital will be used toward the restoration and functionality of the building, from exterior to interior systems.
- Maple Place Inc. has been waived of rental expenses (per building owner) until building is functional and project is complete; building owner assumes responsibility for payments of mortgage, property taxes, building insurance, and all functioning systems (electrical, HVAC, plumbing/water/sewer).
- Total Project Cost (estimated): \$1.6 million dollars [\$1.233 million for project with an additional \$.367 million in cash reserve for unanticipated costs and expenses during restoration project].
- Project Cost and Breakdown:
  - The total cost of the building restoration project is projected at an estimated 1.6 million dollars.
    - Primary systems are estimated to cost a total of \$500,000.
      - Plumbing (not including sprinkler system) is estimated at \$100,000.
        - Sprinkler system replacement is estimated at \$50,000.
      - Electrical is estimated at \$250,000.
        - This includes a complete rewiring and updating of the building, including both original freight elevator and installed single-person ADA-compliant elevator; cleanup and removal of all old and unused boxes and electricals; and replacement of fluorescent light fixtures with period-specific non-fluorescent fixtures.
      - HVAC is estimated at \$100,000.
    - Exterior restoration and restructuring of the building is estimated at \$500,000.00.
      - This includes replacement of all windows, casements, concrete sills, and transoms; doors and frames; replacement of concrete cornice curbing on south and west sides, separating first and second floors; repair to brick damage, restructuring of south side's first floor, and rebuild of north side's first floor; re-opening, grating, and drainage for basement window wells on east and west sides, including windows and casements; complete replacement of roof, skylights, and gutter/downspout systems; and replacement of west and south sidewalks, as well as north parking lot and east parking lot/thoroughfare.
    - Purchase and installation of single-person elevator, as well as updating for handicap accessibility.
      - Elevator purchase and installation: \$25,000.
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- Construction and implementation of courtyard and community gardens.
  - Courtyard estimated cost: \$20,000.
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  - Blueprints: \$3,000.
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  - Building furniture and room furnishings: \$100,000.
  - Commercial/Industrial grade caterer's kitchen (second floor), including all furnishings: \$10,000.
  - Additional aesthetics: \$25,000.
    - This would include items such as paint, additional trim, etc.

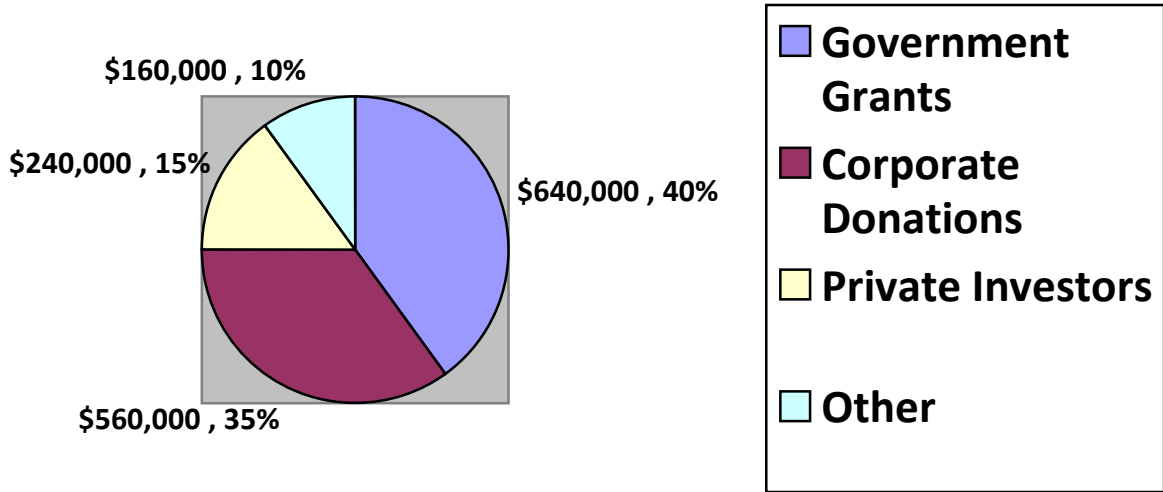
## 10.2 Secured Funding

- Sources of funding currently include private donations; no grant funding has yet been allocated to fund the project.
- Maple Place Inc. has collected private donations this year from 7 individuals and businesses, totaling \$850 in cash donations and \$3250 in equipment and furniture donations.

## 10.3 Total Financing Requirements

- As of now, Maple Place Inc. is not requesting any bank loans; our primary sources of funding are expected to be allocated both publicly and privately by organizations, foundations, and individuals.
- Of our \$1.6 million dollar estimate, we approximate the breakdown of financing into the following categories and percentages:

# Financing Request



## 11.0 Development & Milestones [INCOMPLETE]

### 11.1 Completed Actions

• <i>Re-opened freight lift on 1st FL. and 2nd Fl.</i>	<i>Sep 2017</i>
• <i>Removed all false rooms on 1st Fl. central and west sides</i>	<i>May-Nov 2017</i>
• <i>Removed all drop ceiling tile from original building structure ceiling</i>	<i>Nov 2017</i>
• <i>Awarded waiver of rental expenses by owner until building project is complete</i>	<i>Jun 2018</i>
• <i>Completed removal of 1st Fl. central subflooring; re-exposed original flooring</i>	<i>Aug 2018</i>
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### 11.2 Actions to Be Completed

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### 11.3 Timeline

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## 12.0 Risks & Contingencies

### 12.1 Risks

- Known Risks
  - Fundraising challenges
- Potential Risks
  - Loss of a key employee/board member

### 13.2 Contingency Planning

- Contingency Plan: [INCOMPLETE]

## 13.0 Financial Data Assumptions & Highlights [INCOMPLETE]

### 13.1 Financial data assumptions

- Income Statement
- Balance Sheet
- Cash Flow
- Financial Ratios
- Customers

### 13.2 Financial Highlights



- Please see the chart following for Maple Place Inc.'s key financial performance measures, including sales, gross profit, operating profit and net profit.

<b>FIVE YEAR FINANCIAL HIGHLIGHTS</b>		Year 1	Year 2	Year 3	Year 4	Year 5
Funding						
Direct Costs						
Gross Surplus %						
Expenses						
Surplus Before Interest & Taxes						
<b>Net Surplus</b>						
<b>Net Surplus %</b>						

## 14.0 Exit Strategy

### 14.1 Exit strategy

- Maple Place Inc. has two main plans for exiting the organization:
  - Liquidation in times of unrecoverable financial losses.
    - Per Maple Place Inc.'s articles of incorporation: *"Upon dissolution of The Building, the Board of Directors shall, after paying or making provisions for the payment of all of the liabilities of The Building, dispose of all of the assets of The Building exclusively for the purposes of The Building in such manner, or to such organization or organizations organized and operated exclusively for charitable, educational, religious, literary or scientific purposes as shall at the time qualify as an exempt organization or organizations under I.R.C. Section 501 (c)(3), as amended, as the Board of Directors shall determine. Any such assets not so disposed of shall be disposed of by the Circuit Court of the 9<sup>th</sup> Judicial Court of Forest County, Wisconsin exclusively for such purposes or to such organization or organizations, as the Court shall determine, which are organized and operated exclusively for such purposes. "*
  - Sale and/or transfer of the organization.
  - As the building itself is not owned by the organization, all other responsibilities regarding the property itself fall under the jurisdiction of the building owner.