

# JOINT ECONOMIC AND COMMUNITY DEVELOPMENT BOARD OF ROANE COUNTY

Thursday, May 21, 2026, 5 pm

## PROPOSED AGENDA

### JECDB FY25-26

Sasha Little, *Chair*

Sharon Templeton,  
*Vice-Chair*

Jim Owens, *Treasurer*

Becky Ruppe, *Secretary*

Chris Ayers

Jeff Bohanan

Steve Byerly

Wade Creswell

Lynn Farnham

Derek Hagemeyer

Lindsay Hammill

Randy Hemann

Junior Hendrickson

Sean Hensley

Russell Jenkins

Kathy May-Martin

Scott Mason

Mayor Tim Neal

Richard Owens

Tabitha Poland

Jim Palmer

Jesse Smith

Mayor Jason Stiltner

Jason Turner

Candace Vannasdale

Kyle Wentland

Dr. Chris Whaley

- 1) Call to Order
- 2) Proof of notice
- 3) Public Comment
- 4) Review and Approval of Minutes – February 19, 2026\*
- 5) President's Report
- 6) Old Business
- 7) New Business
- 8) Adjournment\*

*\*Needs Committee Vote*

**\*\*\*\*\*NOTICE\*\*\*\*\***

**TO: JOINT ECONOMIC AND COMMUNITY DEVELOPMENT BOARD  
MEMBERS OF THE COUNTY OF ROANE, TENNESSEE, AND THE  
GENERAL PUBLIC**

**FROM: SASHA LITTLE, CHAIRPERSON**

**DATE: THURSDAY, MAY 21, 2026**

**TIME: 5:00 P.M. – JECDB EXECUTIVE COMMITTEE MEETING  
5:15 P.M. – FULL JOINT ECONOMIC AND COMMUNITY  
DEVELOPMENT BOARD MEETING**

**PLACE: THE ROANE ALLIANCE  
KINGSTON, TENNESSEE**

**SUBJECT: REGULAR MEETING**

**THE BOARD WILL RESERVE A PERIOD FOR PUBLIC COMMENT DURING THE MEETING,  
AND ANY PERSON WANTING TO PROVIDE PUBLIC COMMENT AT THE MEETING SHALL  
EXPRESS THEIR DESIRE TO DO SO IN PERSON IMMEDIATELY PRIOR TO SUCH  
MEETING.**

**JOINT ECONOMIC AND COMMUNITY DEVELOPMENT BOARD  
OF ROANE COUNTY**

**THURSDAY, FEBRUARY 19, 2026**

**THE ROANE ALLIANCE**

**MINUTES**

Chairperson Sasha Little called the meeting to order.

**Members Present:** Sharon Templeton, Jim Owens, Becky Ruppe, Kathy May- Martin, Steve Byerly, Wade Creswell, Lynn Farnham, Lindsay Hammill, Randy Hemann, Russell Jenkins, Tim Neal, Richard Owens, Cory Jenkins, Jason Turner, Dr. Chris Whaley

**Members Absent:** Chris Ayers, Jeff Bohanon, Derke Hagemeyer, Junior Hendrickson, Sean Hensley, Scott Mason, Tabitha Poland, Jim Palmer, Jesse Smith, Candace Vannasdale, Kyle Wentland

**Visitors Present:** None

**Others Present:** Justin Snow, Dawn Carlock, Cary Parten, Roane Alliance staff.

**Review and Approval of Minutes:**

**Minutes to the November 20, 2025, meeting were approved on a motion by Chris Whaley and seconded by Richard Owens. The motion was unanimously approved.**

**President's Report:** Deferred to the Roane Alliance full board meeting.

**Old Business:** None

**New Business:** None

**With no further business to discuss, the meeting was adjourned on a motion by Wade Creswell, seconded by Richard Owens.**

Minutes signed by President Justin Snow.

**EXECUTIVE COMMITTEE  
JOINT ECONOMIC AND COMMUNITY DEVELOPMENT  
BOARD OF ROANE COUNTY**  
Thursday, May 21, 2026, 5 pm

Executive Comm. FY25-26

**PROPOSED AGENDA**

Sasha Little  
Wade Creswell  
Randy Hemann  
Junior Hendrickson  
Kathy May-Martin  
Scott Mason  
Mayor Tim Neal  
Jim Palmer  
Becky Ruppe  
Mayor Jason Stiltner

- 1) Call to Order
- 2) Proof of notice
- 3) Public Comment
- 4) Review and Approval of Minutes – February 19, 2026\*
- 5) President's Report
- 6) Old Business
- 7) New Business
- 8) Adjournment\*

*\*Needs Committee Vote*

**\*\*\*\*\*NOTICE\*\*\*\*\***

**TO: JOINT ECONOMIC AND COMMUNITY DEVELOPMENT BOARD  
MEMBERS OF THE COUNTY OF ROANE, TENNESSEE, AND THE  
GENERAL PUBLIC**

**FROM: SASHA LITTLE, CHAIRPERSON**

**DATE: THURSDAY, MAY 21, 2026**

**TIME: 5:00 P.M. – JECDB EXECUTIVE COMMITTEE MEETING  
5:15 P.M. – FULL JOINT ECONOMIC AND COMMUNITY  
DEVELOPMENT BOARD MEETING**

**PLACE: THE ROANE ALLIANCE  
KINGSTON, TENNESSEE**

**SUBJECT: REGULAR MEETING**

**THE BOARD WILL RESERVE A PERIOD FOR PUBLIC COMMENT DURING THE MEETING,  
AND ANY PERSON WANTING TO PROVIDE PUBLIC COMMENT AT THE MEETING SHALL  
EXPRESS THEIR DESIRE TO DO SO IN PERSON IMMEDIATELY PRIOR TO SUCH  
MEETING.**

**EXECUTIVE COMMITTEE**  
**JOINT ECONOMIC AND COMMUNITY DEVELOPMENT BOARD**  
**OF ROANE COUNTY**

**THURSDAY, FEBRUARY 19, 2026**

**THE ROANE ALLIANCE**

**MINUTES**

Chairperson Sasha Little called the meeting to order.

**Members Present:** Becky Ruppe, Kathy May- Martin, Wade Creswell, Randy Hemann, Tim Neal, Cory Jenkins

**Members Absent:** Junior Hendrickson, Scott Mason, Jim Palmer

**Visitors Present:** None

**Others Present:** Justin Snow, Dawn Carlock, Cary Parten, Roane Alliance staff.

**Review and Approval of Minutes:**

**Minutes to the November 20, 2025, meeting were approved on a motion by Randy Hemann and seconded by Wade Creswell. The motion was unanimously approved.**

**President's Report:** Deferred to the Roane Alliance full board meeting.

**Old Business:** None

**New Business:** None

**With no further business to discuss, the meeting was adjourned on a motion by Wade Creswell, seconded by Kathy May-Martin.**

Minutes signed by President Justin Snow.



**Board of Directors FY25- 26**

Sasha Little, *Chair*

Sharon Templeton,  
*Vice-Chair*

Jim Owens, *Treasurer*

Becky Ruppe, *Secretary*

Chris Ayers

Jeff Bohanan

Steve Byerly

Wade Creswell

Lynn Farnham

Derek Hagemeyer

Lindsay Hammill

Randy Hemann

Junior Hendrickson

Sean Hensley

Russell Jenkins

Kathy May-Martin

Scott Mason

Mayor Tim Neal

Richard Owens

Jim Palmer

Tabitha Poland

Jesse Smith

Mayor Jason Stiltner

Sharon Templeton

Jason Turner

Candace Vannasdale

Kyle Wentland

Dr. Chris Whaley

**BOARD OF DIRECTORS MEETING**

Thursday, May 21, 2026

5 pm

**PROPOSED AGENDA**

1. Call to Order
2. Approval of Minutes – February 19, 2026\*
3. Treasurer’s Report\*
  - a. Financial Report – March 2026\*
  - b. FY27 Roane Alliance Budget\*
4. Chairman’s Report
5. President’s Report
  - a. Partner & Marketing Updates
  - b. TRA Annual Report / Roane Alliance Recap
6. New Business
  - a. Election of Officers / New Members\*
  - b. Dawn Carlock / Signatory Privileges/ Simmons Bank  
Property Account
7. Old Business
8. Comments & Announcements
9. Adjournment\*

*\*Needs Board Vote*

**Honorary Members**

Dr. Julian Ahler

Jim Henry

Jerry Stephens

George Wilson

**FY27 Board Meeting Dates – Meetings are at 5 pm**

August 20, 2026

November 19, 2026

February 18, 2027

May 20, 2027

# THE ROANE ALLIANCE BOARD MEETING

THURSDAY, FEBRUARY 19, 2026

## THE ROANE ALLIANCE

### MINUTES

Chairperson Sasha Little called the meeting to order.

**Members Present:** Sharon Templeton, Jim Owens, Becky Ruppe, Kathy May- Martin, Steve Byerly, Wade Creswell, Lynn Farnham, Lindsay Hammill, Randy Hemann, Russell Jenkins, Tim Neal, Richard Owens, Cory Jenkins, Jason Turner, Dr. Chris Whaley

**Members Absent:** Chris Ayers, Jeff Bohanon, Derke Hagemeyer, Junior Hendrickson, Sean Hensley, Scott Mason, Tabitha Poland, Jim Palmer, Jesse Smith, Candace Vannasdale, Kyle Wentland

**Visitors Present:** None

**Others Present:** Justin Snow, Dawn Carlock, Cary Parten, Roane Alliance staff.

#### **Review and Approval of Minutes:**

**Minutes to the November 20, 2025, meeting were approved on a motion by Richard Owens and seconded by Luynn Farnham. The motion was unanimously approved.**

#### **Treasurer's Report:**

- a. Financial Report- Jim Owens reported on the financial report for the Roane Alliance and Tourism for December 2025.

**A motion was made by Randy Hemann and seconded by Lyndsay Hammill to approve the December 2025 financial reports. The motion was unanimously approved.**

#### **Chariman's Report**

- a. The Executive committee met to complete the President/CEO Evaluations
- b. At the May Meeting, new Board Officers and Members will be selected. The nominating committee is Sean Hensley, Lydsay Hammill and Richard Owens.

#### **President's Report:**

Justin Snow Reported:

- a. ECD- Additional property purchase identified through Property Evaluation Process, pursuing TVA InvestPrep and TNECD Site Development Grant
- b. Three Star Grant awarded to Roane Alliance for \$180,000 for tourism, nuclear education
- c. Hosting Nuclear Professional Development Day with Roane County Elementary Educators
- d. Upsoming events include Songwriter's Round, Regional Legislative Breakfast, Meet the Candidates, Roane Alliance Gala and Books, Blankets, & Brews.

**Old Business:** None

**New Business:** None

**Comments and Announcements: None**

**With no further business to discuss, the meeting was adjourned on a motion by Chris Whaley, seconded by Richard Owens.**

Minutes signed by President Justin Snow.

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# JARRARD, NOWELL & RUSSELL, LLC

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an ARCHER LEWIS firm

To Management  
Roane Alliance, Inc.  
Kingston, Tennessee

Management is responsible for the accompanying financial statements of Roane Alliance, Inc. (a nonprofit corporation), which comprise the statement of assets, liabilities, and net assets – modified cash basis as of March 31, 2026 and the related statements of revenues, expenses, and other changes in net assets – modified cash basis, for the nine months then ended in accordance with the modified cash basis of accounting, and for determining that the modified cash basis of accounting is an acceptable financial reporting framework. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. We do not express an opinion, a conclusion, nor provide any assurance on these financial statements.

The financial statements are prepared in accordance with the modified cash basis of accounting, which is a basis of accounting other than accounting principles generally accepted in the United States of America.

Management has elected to omit substantially all the disclosures ordinarily included in financial statements prepared in accordance with the modified cash basis of accounting. If the omitted disclosures were included in the financial statements, they might influence the user's conclusions about the Organization's assets, liabilities, net assets, revenues, and expenses. Accordingly, the financial statements are not designed for those who are not informed about such matters.

The supplementary information contained in the supplementary schedules – statement of assets, liabilities, and net assets by division, supplementary schedules – statement of revenues, expenses, and other changes in net assets by division, and supplementary schedules – profit & loss – budget vs actual are presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management. The supplementary information was subject to our compilation engagement. We have not audited or reviewed the supplementary information and do not express an opinion, a conclusion, nor provide any assurance on such information.

We are not independent with respect to Roane Alliance, Inc.

**Jarrard, Nowell, & Russell, LLC**

Charleston, SC  
April 29, 2026

*"Archer Lewis" is a brand name under which Archer Lewis, LLC, its subsidiary entities, and Jarrard, Nowell & Russell, LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable laws, regulations and professional standards. Jarrard, Nowell & Russell, LLC is a licensed independent CPA firm that provides attest services and Archer Lewis, LLC and its subsidiary entities provide bookkeeping, tax and advisory services. Archer Lewis, LLC and its subsidiary entities are not licensed CPA firms.*

**The Roane Alliance Inc.**  
**Statement of Assets, Liabilities, and Net Assets -**  
**Modified Cash Basis**  
**March 31, 2026**

**ASSETS**

**CURRENT ASSETS**

Cash in bank		
Cash in bank - TRA	\$	67,480.97
Cash in bank-TRA-TVA Image Repair Fund		19,115.25
Cash in bank - Tourism		143,812.92
Certificates of deposit - TRA		12,456.00
<b>TOTAL CURRENT ASSETS</b>		<b>242,865.14</b>

**FIXED ASSETS**

Furniture and equipment - Tourism		12,445.00
Furniture and equipment - TRA		46,589.70
Automobile - TRA		26,119.83
Building - TRA		312,764.66
Land - TRA		50,000.00
Improvements - TRA		62,075.03
ROC lease asset-operating		15,256.79
Accumulated depreciation - TRA		(279,874.47)
Accumulated depreciation - Tourism		(8,089.33)
<b>TOTAL FIXED ASSETS</b>		<b>237,307.21</b>

**OTHER ASSETS**

Due from Chamber		-
Due from IDB		90.00
Due from ETC		555.30
Utility deposits - TRA		265.00
<b>TOTAL OTHER ASSETS</b>		<b>910.30</b>

<b>TOTAL ASSETS</b>	<b>\$</b>	<b>481,082.65</b>
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**LIABILITIES & NET ASSETS**

**CURRENT LIABILITIES**

Payroll liabilities	\$	4,920.59
ROU Lease liability-ST		5,689.82
Due to United Way		280.00
Direct deposit liabilities		-
<b>TOTAL CURRENT LIABILITIES</b>		<b>10,890.41</b>

**LONG TERM LIABILITIES**

ROU lease liability-LT		9,566.97
<b>TOTAL LONG TERM LIABILITIES</b>		<b>9,566.97</b>

<b>TOTAL LIABILITIES</b>		<b>20,457.38</b>
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**NET ASSETS**

TRA - without donor restrictions		312,456.68
Tourism - with donor restrictions		148,168.59
<b>TOTAL NET ASSETS</b>		<b>460,625.27</b>

<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$</b>	<b>481,082.65</b>
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See accountants' compilation report.

**The Roane Alliance, Inc.**  
**Statements of Revenues, Expenses, and Other Changes in Net Assets**  
**Modified Cash Basis**  
**For the Nine Months Ended March 31, 2026**

	TRA - OPS	Tourism	TOTAL
	Without donor restrictions	With donor restrictions	
<b>REVENUES</b>	\$ 192,078.00	\$ 154,782.00	\$ 346,860.00
<b>EXPENSES</b>			
6000 - Administrative Services Fees	8,670.17	5,436.04	14,106.21
6350 - Travel Related	2,686.73	8,811.47	11,498.20
6130 - Bank Charges	193.01	83.01	216.02
5050 - Cost of Land Sales	-	-	-
6170 - Equipment Purchases	164.46	263.25	427.71
5140 - Contributions	-	-	-
8405 - Office Expense	13,539.26	7,200.57	20,739.83
6500 - Overhead Costs	25,196.41	20,903.39	46,099.80
6605 - Personnel Costs	87,877.73	78,140.22	166,017.95
6770 - Supplies	-	-	-
6860 - Advertising/Marketing	1,526.98	37,012.92	38,539.90
6850 - Taxes	3,311.00	-	3,311.00
6900 - Program Expense	38,335.88	-	38,335.88
<b>TOTAL EXPENSES</b>	<u>181,441.63</u>	<u>157,850.87</u>	<u>339,292.50</u>
Other Income	-	-	-
<b>INCREASE (DECREASE) IN NET ASSETS</b>	10,636.37	(3,068.87)	7,567.50
<b>NET ASSETS AT BEGINNING OF PERIOD</b>	301,820.31	151,237.46	453,057.77
<b>NET ASSETS AT END OF PERIOD</b>	<u>\$ 312,456.68</u>	<u>\$ 148,168.59</u>	<u>\$ 460,625.27</u>

The Roane Alliance, Inc.  
 TRA-OPS - Supplementary Schedule  
 Statement of Assets, Liabilities, and Net Assets -  
 Modified Cash Basis  
 March 31, 2026

**ASSETS**

**CURRENT ASSETS**

Cash in bank	\$ 67,480.97
Cash in bank TVA Image repair funds	19,115.25
C D - United Community Bank	<u>12,456.00</u>
<b>TOTAL CURRENT ASSETS</b>	<b><u>99,052.22</u></b>

**FIXED ASSETS**

Improvements	62,075.03
Automobile	26,119.83
Land	50,000.00
Building	312,784.66
Furniture and equipment	46,589.70
ROC lease asset-operating	15,256.79
Accumulated depreciation	<u>(279,874.47)</u>
<b>TOTAL FIXED ASSETS</b>	<b><u>232,951.54</u></b>

**OTHER ASSETS**

Due from Chamber	-
Due from IDB	90.00
Due from ETC	555.30
Utility deposits	<u>265.00</u>
<b>TOTAL OTHER ASSETS</b>	<b><u>910.30</u></b>
<b>TOTAL ASSETS</b>	<b><u>\$ 332,914.06</u></b>

**LIABILITIES & NET ASSETS**

**CURRENT LIABILITIES**

Payroll tax liability	\$ 4,920.59
Direct deposit liabilities	-
ROU lease asset - ST	5,689.82
Due to United Way	<u>280.00</u>
<b>TOTAL CURRENT LIABILITIES</b>	<b><u>10,890.41</u></b>

**LONG TERM LIABILITIES**

ROU lease asset - LT	<u>9,566.97</u>
<b>TOTAL LONG TERM LIABILITIES</b>	<b><u>9,566.97</u></b>

**TOTAL LIABILITIES**

20,457.38

**NET ASSETS**

Net Assets without donor restrictions	<u>312,456.68</u>
<b>TOTAL NET ASSETS</b>	<b><u>312,456.68</u></b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b><u>\$ 332,914.06</u></b>

See accountants' compilation report.

**The Roane Alliance, Inc.**  
**TRA - OPS - Supplementary Schedules**  
**Statements of Revenue, Expenses and Other Changes in Net Assets -**  
**Modified Cash Basis**  
**For the Nine Months Ended March 31, 2026**

	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	TOTAL
<b>REVENUES</b>	\$ 9,333.00	\$ 19,833.00	\$ 4,500.00	\$ 5,500.00	\$ 14,634.96	\$ 4,390.00	\$ 42,423.88	\$ 55,525.00	\$ 38,828.36	\$ 192,078.00
<b>EXPENSES</b>										
6000 - Administrative Services Fees	290.74	290.74	600.74	290.74	290.74	2,790.74	290.74	321.68	3,413.31	8,670.17
6350 - Travel Related	475.00	424.08	311.67	420.27	58.26	307.63	140.47	262.43	287.82	2,688.73
6130 - Bank Charges	10.00	5.00	10.00	-	5.00	36.01	5.00	5.00	-	133.01
6170 - Equipment Purchases	92.25	-	-	-	-	-	72.21	-	-	164.46
6200 - Interest Expense	606.25	720.36	637.81	551.11	938.38	510.99	4,368.30	3,061.75	2,144.51	19,539.26
6405 - Office Expense	3,348.62	2,439.10	4,929.55	2,469.62	2,240.15	2,815.74	2,476.09	2,079.48	2,296.06	25,186.41
6500 - Overhead Costs	8,247.11	8,756.01	8,455.96	12,391.87	10,660.05	8,814.86	10,097.86	9,094.15	10,359.86	87,971.73
6605 - Personnel Costs	-	46.39	695.01	129.44	-	445.01	104.58	66.57	70.01	1,526.99
6770 - Supplies	-	-	-	-	-	-	3,311.00	-	-	3,311.00
6800 - Advertising/Marketing	-	-	-	-	-	9,550.76	-	22,285.12	3,250.00	38,335.88
6850 - Taxes	-	-	-	-	-	-	-	-	-	-
6908 - Program expense	-	-	-	-	-	-	-	-	-	-
<b>TOTAL EXPENSES</b>	14,069.97	12,691.67	15,700.54	19,503.05	14,192.59	25,423.14	20,858.23	37,175.18	21,926.27	181,441.63
<b>OTHER INCOME</b>	-	-	-	-	-	-	-	-	-	-
<b>INCREASE (DECREASE) IN NET ASSETS</b>	(7,736.97)	7,151.33	(11,200.54)	(14,003.05)	442.36	(20,923.14)	21,555.45	18,349.82	17,002.09	10,635.37
<b>NET ASSETS AT BEGINNING OF PERIOD WITHOUT DONOR RESTRICTIONS</b>	301,820.31	294,083.34	301,234.67	290,034.13	276,051.08	276,473.46	255,650.32	277,405.77	295,454.59	301,820.31
<b>NET ASSETS AT END OF PERIOD WITHOUT DONOR RESTRICTIONS</b>	\$ 294,083.34	\$ 301,234.67	\$ 280,034.13	\$ 276,031.08	\$ 276,473.46	\$ 255,650.32	\$ 277,105.77	\$ 265,454.59	\$ 312,456.68	\$ 312,456.68

See accountants' compilation report.

3:32 PM  
04/29/26  
Cash Basis

The Roane Alliance, Inc. - TRA-OPS  
Supplementary Schedule - Profit & Loss - Budget vs. Actual  
March 2026

	<u>Mar 26</u>	<u>Budget</u>	<u>\$ Over Budget</u>
<b>Ordinary Income/Expense</b>			
Income			
4000 · Revenue	<u>38,828.36</u>	<u>45,836.94</u>	<u>-7,008.58</u>
<b>Total Income</b>	<u>38,828.36</u>	<u>45,836.94</u>	<u>-7,008.58</u>
<b>Gross Profit</b>	<u>38,828.36</u>	<u>45,836.94</u>	<u>-7,008.58</u>
Expense			
6000 · Administrative Services Fees	3,413.31	3,491.40	-78.09
6100 · Travel Related Expenses	287.52	416.68	-129.16
6130 · Bank charges	5.00	12.50	-7.50
6150 · Depreciation Expense	891.21	870.51	20.70
6170 · Equipment purchases	0.00	100.00	-100.00
6405 · Office Expense	2,144.51	1,814.57	329.94
6500 · Overhead Costs	1,404.85	1,980.83	-575.98
6605 · Personnel Costs	10,359.86	10,144.26	215.60
6800 · Media Marketing	70.01	491.66	-421.65
6900 · Program Expense	<u>3,250.00</u>	<u>21,032.85</u>	<u>-17,782.85</u>
<b>Total Expense</b>	<u>21,826.27</u>	<u>40,355.26</u>	<u>-18,528.99</u>
<b>Net Ordinary Income</b>	<u>17,002.09</u>	<u>5,481.68</u>	<u>11,520.41</u>
<b>Net Income</b>	<u>17,002.09</u>	<u>5,481.68</u>	<u>11,520.41</u>

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**The Roane Alliance, Inc. - TRA-OPS**  
**Supplementary Schedule - Profit & Loss - Budget vs. Actual**  
**July 2025 through March 2026**

	Jul '25 - Mar 26	Budget	\$ Over Budget
<b>Ordinary Income/Expense</b>			
<b>Income</b>			
4000 - Revenue	192,078.00	196,233.31	-4,155.31
<b>Total Income</b>	<u>192,078.00</u>	<u>196,233.31</u>	<u>-4,155.31</u>
<b>Gross Profit</b>	192,078.00	196,233.31	-4,155.31
<b>Expense</b>			
8000 - Administrative Services Fees	8,670.17	12,715.28	-4,045.11
6100 - Travel Related Expenses	2,686.73	3,750.00	-1,063.27
6130 - Bank charges	133.01	112.50	20.51
6150 - Depreciation Expense	7,780.88	7,354.59	426.29
6170 - Equipment purchases	164.46	900.00	-735.54
6405 - Office Expense	13,539.26	11,531.25	2,008.01
6500 - Overhead Costs	17,415.53	17,827.49	-411.96
6605 - Personnel Costs	87,877.73	96,282.72	-8,404.99
6800 - Media Marketing	1,526.98	4,425.00	-2,898.02
6850 - Taxes	3,311.00	4,200.00	-889.00
6900 - Program Expense	38,335.88	39,493.03	-1,157.15
<b>Total Expense</b>	<u>181,441.63</u>	<u>198,591.86</u>	<u>-17,150.23</u>
<b>Net Ordinary Income</b>	<u>10,636.37</u>	<u>-2,358.55</u>	<u>12,994.92</u>
<b>Net Income</b>	<u>10,636.37</u>	<u>-2,358.55</u>	<u>12,994.92</u>

**The Roane Alliance, Inc.**  
**Tourism - Supplementary Schedule**  
**Statement of Assets, Liabilities and Net Assets -**  
**Modified Cash Basis**  
**March 31, 2026**

**ASSETS**

**CURRENT ASSETS**

Cash in bank	\$ 143,812.92
<b>TOTAL CURRENT ASSETS</b>	<u>143,812.92</u>

**FIXED ASSETS**

Furniture & equipment	12,445.00
Accumulated depreciation	<u>(8,089.33)</u>
<b>TOTAL FIXED ASSETS</b>	<u>4,355.67</u>
<b>TOTAL ASSETS</b>	<u>\$ 148,168.59</u>

**LIABILITIES & NET ASSETS**

**CURRENT LIABILITIES**

Due to IDB	\$ -
<b>TOTAL CURRENT LIABILITIES</b>	<u>-</u>

**NET ASSETS**

Net Assets with donor restrictions	148,168.59
<b>TOTAL NET ASSETS</b>	<u>148,168.59</u>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<u>\$ 148,168.59</u>

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See accountants' compilation report.

**The Roane Alliance, Inc.**  
**Tourism - Supplementary Schedule**  
**Statements of Revenues, Expenses, and Other Changes in Net Assets -**  
**Modified Cash Basis**  
**For the Nine Months Ended March 31, 2026**

	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	TOTAL
<b>REVENUES</b>	\$ 9,227.50	\$ -	\$ 45,000.00	\$ 1,431.00	\$ 45,000.00	\$ -	\$ 9,123.50	\$ 45,000.00	\$ -	\$ 154,722.00
<b>EXPENSES</b>										
6000 - Administrative Services Fees	280.74	280.74	340.74	280.74	280.74	2,790.74	290.74	321.88	529.18	5,438.04
6350 - Travel Related	1,105.72	450.71	615.58	1,379.05	895.54	200.88	1,621.34	319.96	2,222.58	8,811.47
6405 - Office Expense	1,640.34	389.97	521.11	2,043.22	395.39	489.20	844.09	642.82	527.58	7,463.82
6500 - Overhead Costs	1,946.40	2,315.04	3,792.51	2,193.96	2,045.79	2,337.57	2,106.98	2,168.34	2,110.70	20,886.40
6605 - Personnel Costs	8,106.89	7,883.54	8,552.80	11,715.47	9,644.09	7,504.42	8,437.02	8,237.71	8,058.18	78,140.22
6800 - Advertising/Marketing	2,453.85	11,985.14	1,418.06	12,476.91	1,443.00	1,329.80	2,154.00	1,110.96	2,639.00	37,812.92
6850 - Taxes	-	-	-	-	-	-	-	-	-	-
6900 - Program Expense	-	-	-	-	-	-	-	-	-	-
<b>TOTAL EXPENSES</b>	15,544.04	23,340.14	15,240.80	30,084.36	14,666.55	14,651.91	15,454.18	12,801.47	16,087.42	157,650.87
<b>INCREASE (DECREASE) IN NET ASSETS</b>	(6,316.54)	(23,340.14)	29,759.20	(28,653.36)	30,333.45	(14,651.91)	(6,330.68)	32,198.53	(16,087.42)	(3,066.87)
<b>NET ASSETS AT BEGINNING OF PERIOD WITH DONOR RESTRICTIONS</b>	151,237.45	144,820.92	121,580.78	151,339.88	122,706.62	153,040.07	136,388.16	132,057.48	184,256.01	151,237.45
<b>NET ASSETS AT END OF PERIOD WITH DONOR RESTRICTIONS</b>	\$ 144,920.92	\$ 121,580.78	\$ 151,339.98	\$ 122,706.62	\$ 153,040.07	\$ 138,386.16	\$ 132,057.48	\$ 164,256.01	\$ 148,168.59	\$ 148,168.59

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04/28/26  
Cash Basis

**The Roane Alliance, Inc. - Tourism**  
**Supplementary Schedule - Profit & Loss - Budget vs. Actual**  
**March 2026**

	Mar 26	Budget	\$ Over Budget
<b>Ordinary Income/Expense</b>			
<b>Income</b>			
4000 · Revenue			
4110 · Grants	0.00	5,869.61	-5,869.61
4150 · Miscellaneous Revenue			
4157 · Merchandise	0.00	25.00	-25.00
<b>Total 4150 · Miscellaneous Revenue</b>	<b>0.00</b>	<b>25.00</b>	<b>-25.00</b>
<b>Total 4000 · Revenue</b>	<b>0.00</b>	<b>5,894.61</b>	<b>-5,894.61</b>
<b>Total Income</b>	<b>0.00</b>	<b>5,894.61</b>	<b>-5,894.61</b>
<b>Gross Profit</b>	<b>0.00</b>	<b>5,894.61</b>	<b>-5,894.61</b>
<b>Expense</b>			
6000 · Administrative Services Fees			
6180 · Insurance			
6185 · Liability Insurance	207.50	270.00	-62.50
<b>Total 6180 · Insurance</b>	<b>207.50</b>	<b>270.00</b>	<b>-62.50</b>
6270 · Professional Fees			
6650 · Accounting	321.68	290.74	30.94
<b>Total 6270 · Professional Fees</b>	<b>321.68</b>	<b>290.74</b>	<b>30.94</b>
<b>Total 6000 · Administrative Services Fees</b>	<b>529.18</b>	<b>560.74</b>	<b>-31.56</b>
6100 · Travel Related Expenses			
6110 · Mileage Expense	317.72	200.00	117.72
6370 · Business Meals	113.61	83.34	30.27
6380 · Transport, Food, & Lodging	1,791.35	208.34	1,583.01
<b>Total 6100 · Travel Related Expenses</b>	<b>2,222.68</b>	<b>491.68</b>	<b>1,731.00</b>
6150 · Depreciation Expense	69.14	69.14	0.00
6170 · Equipment purchases	0.00	108.34	-108.34
6405 · Office Expense			
6160 · Dues and Subscriptions	0.00	500.00	-500.00
6240 · Miscellaneous	25.00	92.50	-67.50
6250 · Postage and Delivery	0.00	33.34	-33.34
6260 · Printing and Reproduction	5.99	91.68	-85.67
6550 · Office Supplies	335.42	216.66	118.76
6551 · Rental Equipment	161.27	149.66	11.61
<b>Total 6405 · Office Expense</b>	<b>527.68</b>	<b>1,083.82</b>	<b>-556.14</b>
6500 · Overhead Costs			
6290 · Rent	1,500.00	1,500.00	0.00
6300 · Repairs & Maintenance			
6320 · Computer Repairs/Maintenance	96.63	186.84	-90.21
6336 · Park maintenance	257.18	158.50	98.68
<b>Total 6300 · Repairs &amp; Maintenance</b>	<b>353.81</b>	<b>345.34</b>	<b>8.47</b>
6340 · Telephone/Communications	187.75	254.16	-66.41
<b>Total 6500 · Overhead Costs</b>	<b>2,041.56</b>	<b>2,099.50</b>	<b>-57.94</b>
6605 · Personnel Costs			
6560 · Payroll Expenses	7,389.87	7,461.54	-71.67
6606 · Staff Development	30.00	83.34	-53.34
6607 · Conferences	125.00	200.00	-75.00
6610 · Retirement	180.56	229.16	-48.60
6614 · Insurance-Life	32.64	32.91	-0.27
6615 · Insurance-Medical	300.11	100.00	200.11
<b>Total 6605 · Personnel Costs</b>	<b>8,058.18</b>	<b>8,106.95</b>	<b>-48.77</b>

See accountants' compilation report.

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04/29/26  
Cash Basis

The Roane Alliance, Inc. - Tourism  
Supplementary Schedule - Profit & Loss - Budget vs. Actual  
March 2026

	<u>Mar 26</u>	<u>Budget</u>	<u>\$ Over Budget</u>
6800 - Media Marketing			
6801 - RetireRoane expense	0.00	166.66	-166.66
6803 - Event Sponsorships	0.00	1,166.66	-1,166.66
6800 - Media Marketing - Other	2,639.00	4,161.34	-1,522.34
<b>Total 6800 - Media Marketing</b>	<u>2,639.00</u>	<u>5,494.66</u>	<u>-2,855.66</u>
<b>Total Expense</b>	<u>16,087.42</u>	<u>18,014.83</u>	<u>-1,927.41</u>
<b>Net Ordinary Income</b>	<u>-16,087.42</u>	<u>-12,120.22</u>	<u>-3,967.20</u>
<b>Net Income</b>	<u>-16,087.42</u>	<u>-12,120.22</u>	<u>-3,967.20</u>

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Cash Basis

**The Roane Alliance, Inc. - Tourism**  
**Supplementary Schedule - Profit & Loss - Budget vs. Actual**  
**July 2025 through March 2026**

	Jul '25 - Mar 26	Budget	\$ Over Budget
<b>Ordinary Income/Expense</b>			
<b>Income</b>			
4000 · Revenue			
4030 · Contributions Revenue			
4050 · Restricted	135,000.00	135,000.00	0.00
<b>Total 4030 · Contributions Revenue</b>	<b>135,000.00</b>	<b>135,000.00</b>	<b>0.00</b>
4110 · Grants	17,682.00	22,891.17	-5,209.17
4150 · Miscellaneous Revenue			
4157 · Merchandise	0.00	150.00	-150.00
4150 · Miscellaneous Revenue - Other	2,100.00	0.00	2,100.00
<b>Total 4150 · Miscellaneous Revenue</b>	<b>2,100.00</b>	<b>150.00</b>	<b>1,950.00</b>
<b>Total 4000 · Revenue</b>	<b>154,782.00</b>	<b>158,041.17</b>	<b>-3,259.17</b>
<b>Total Income</b>	<b>154,782.00</b>	<b>158,041.17</b>	<b>-3,259.17</b>
<b>Gross Profit</b>	<b>154,782.00</b>	<b>158,041.17</b>	<b>-3,259.17</b>
<b>Expense</b>			
6000 · Administrative Services Fees			
6180 · Insurance			
6185 · Liability Insurance	257.50	400.00	-142.50
6190 · Other Insurance	0.00	70.00	-70.00
<b>Total 6180 · Insurance</b>	<b>257.50</b>	<b>470.00</b>	<b>-212.50</b>
6270 · Professional Fees			
6650 · Accounting	5,178.54	6,896.78	-1,718.24
<b>Total 6270 · Professional Fees</b>	<b>5,178.54</b>	<b>6,896.78</b>	<b>-1,718.24</b>
<b>Total 6000 · Administrative Services Fees</b>	<b>5,436.04</b>	<b>7,366.78</b>	<b>-1,930.74</b>
6100 · Travel Related Expenses			
6110 · Mileage Expense	2,464.85	1,800.00	664.85
6370 · Business Meals	383.50	750.00	-366.50
6380 · Transport, Food, & Lodging	5,983.12	1,875.00	4,108.12
<b>Total 6100 · Travel Related Expenses</b>	<b>8,811.47</b>	<b>4,425.00</b>	<b>4,386.47</b>
6130 · Bank charges	83.01		
6150 · Depreciation Expense	622.26	622.26	0.00
6170 · Equipment purchases	263.25	975.00	-711.75
6405 · Office Expense			
6160 · Dues and Subscriptions	1,175.00	3,000.00	-1,825.00
6240 · Miscellaneous	917.27	832.50	84.77
6250 · Postage and Delivery	3.12	300.00	-296.88
6260 · Printing and Reproduction	1,581.88	825.00	756.88
6550 · Office Supplies	2,108.88	1,950.00	158.88
6551 · Rental Equipment	1,408.94	1,347.00	61.94
<b>Total 6405 · Office Expense</b>	<b>7,195.09</b>	<b>8,254.50</b>	<b>-1,059.41</b>
6500 · Overhead Costs			
6290 · Rent	13,500.00	13,500.00	0.00
6300 · Repairs & Maintenance			
6320 · Computer Repairs/Maintenance	3,072.07	1,681.50	1,390.57
6336 · Park maintenance	1,882.13	1,426.50	455.63
<b>Total 6300 · Repairs &amp; Maintenance</b>	<b>4,954.20</b>	<b>3,108.00</b>	<b>1,846.20</b>
6340 · Telephone/Communications	1,832.41	2,287.50	-455.09
<b>Total 6500 · Overhead Costs</b>	<b>20,286.61</b>	<b>18,895.50</b>	<b>1,391.11</b>

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 Cash Basis

**The Roane Alliance, Inc. - Tourism**  
**Supplementary Schedule - Profit & Loss - Budget vs. Actual**  
**July 2025 through March 2026**

	Jul '25 - Mar 26	Budget	\$ Over Budget
<b>6605 · Personnel Costs</b>			
6560 · Payroll Expenses	71,822.96	70,884.62	938.34
6606 · Staff Development	271.35	750.00	-478.65
6607 · Conferences	965.63	900.00	65.63
6610 · Retirement	1,731.31	2,176.98	-445.67
6614 · Insurance-Life	262.68	296.25	-33.57
6615 · Insurance-Medical	2,852.29	900.00	1,952.29
6665 · Workmen's Compensation	234.00	350.00	-116.00
<b>Total 6605 · Personnel Costs</b>	<b>78,140.22</b>	<b>76,257.85</b>	<b>1,882.37</b>
<b>6800 · Media Marketing</b>			
6801 · Retirement expense	0.00	1,500.00	-1,500.00
6803 · Event Sponsorships	13,500.00	10,500.00	3,000.00
6800 · Media Marketing - Other	23,512.92	37,452.00	-13,939.08
<b>Total 6800 · Media Marketing</b>	<b>37,012.92</b>	<b>49,452.00</b>	<b>-12,439.08</b>
<b>Total Expense</b>	<b>157,850.87</b>	<b>166,248.89</b>	<b>-8,398.02</b>
<b>Net Ordinary Income</b>	<b>-3,068.87</b>	<b>-8,207.72</b>	<b>5,138.85</b>
<b>Net Income</b>	<b>-3,068.87</b>	<b>-8,207.72</b>	<b>5,138.85</b>

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ROANE ALLIANCE BUDGET	Account	2026-2027	2025-2026
Contributions Revenue	4030	\$70,000.00	\$68,000.00
Gala Combined	4025	\$120,000.00	\$115,000.00
Lease Revenue	4035	\$54,000.00	\$54,000.00
Miscellaneous Revenue	4150	\$1,000.00	\$1,000.00
Education Matters	4056	\$22,500.00	\$10,000.00
Reimbursed Expenses - Other	4190	\$2,500.00	\$2,500.00
Cash Reserves	TVA	\$19,115.00	\$19,115.00
<b>TOTAL INCOME</b>		<b>\$289,115.00</b>	<b>\$269,615.00</b>
Director Liability Insurance	6182	\$400.00	\$400.00
Liability Insurance	6185	\$330.00	\$320.00
Building Insurance	6181	\$3,500.00	\$2,915.00
Auto Insurance	6183	\$1,000.00	\$1,000.00
Other Insurance	6190	\$0.00	\$0.00
Equipment Purchases	6170	\$1,200.00	\$1,200.00
Building Repairs & Maintenance	6310	\$18,250.00	\$12,800.00
Accounting	6650	\$12,000.00	\$12,000.00
Mileage Expense	6110	\$3,000.00	\$2,400.00
Vehicle Repair & Maintenance	6115	\$1,000.00	\$1,000.00
Business Meals	6370	\$1,500.00	\$600.00
Transport, Food, & Lodging	6380	\$1,000.00	\$1,000.00
Dues & Subscriptions	6160	\$500.00	\$200.00
Recycling Pickup	6241	\$200.00	\$200.00
Miscellaneous	6240	\$5,000.00	\$4,500.00
Postage and Delivery	6250	\$2,500.00	\$2,375.00
Legal Fees	6280	\$200.00	\$200.00
Bank Charges	6130	\$250.00	\$150.00
Printing & Reproduction	6260	\$1,000.00	\$1,000.00
Office Supplies	6550	\$5,000.00	\$4,400.00
Rental Equipment	6551	\$2,000.00	\$1,900.00
TRA Annual Reports	6671	\$600.00	\$600.00
Electric	6400	\$4,850.00	\$4,000.00
Water/Sewer	6410	\$900.00	\$850.00
Gas	6420	\$300.00	\$220.00
Computer Repairs/Maintenance	6320	\$2,500.00	\$2,400.00
Telephone/Communications	6340	\$3,000.00	\$3,500.00
Payroll Expenses	6560	\$117,000.00	\$117,000.00
Staff Development	6606	\$1,000.00	\$1,000.00
Conferences	6607	\$600.00	\$600.00
Retirement	6610	\$3,500.00	\$3,500.00
Insurance-Life	6614	\$400.00	\$400.00
Insurance-Medical	6615	\$11,000.00	\$8,500.00
Workmen's Compensation	6665	\$350.00	\$350.00
Media Marketing	6800	\$8,000.00	\$5,900.00
Fund Raiser Expense-Gala	6901	\$45,750.00	\$41,500.00
Taxes	6850	\$4,000.00	\$4,200.00
TRA Open House	6914	\$420.00	\$420.00
Workforce Development	6929	\$0.00	\$0.00
Education Matters	6928	\$6,000.00	\$5,000.00
TVA Image Repair Fund	6909	\$19,115.00	\$19,115.00
Vehicle Purchase	1610	\$0.00	\$0.00
<b>TOTAL EXPENSES</b>		<b>\$289,115.00</b>	<b>\$269,615.00</b>



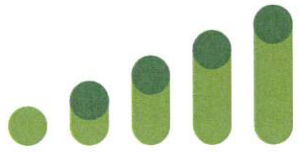
# Roane Alliance Recap

April 2026



**Roane**  
ALLIANCE

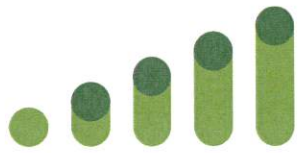
Justin Snow  
President & CEO



## ECD, Education & Workforce



- The Roane County Schools Career Fair took place on March 31<sup>st</sup> at Harriman High School. Over 65 local businesses shared their unique career opportunities with over 1000 8<sup>th</sup>- and 12<sup>th</sup>-graders from every middle and high school in the county. Jennifer Brown did an amazing job collaborating with our partners to make this happen.
- Justin, Jennifer, and Dawn attended the TECD spring conference, where they had the opportunity to collaborate with regional economic development partners. Sessions included updates from TVA, TNECD, and UTCIS.
- The Roane Alliance, in partnership with the Roane County Industrial Development Board, submitted an application to TVA for their InvestPrep program and to the TNECD Site Development Grant Program. Follow-up presentations and site visits are being scheduled for May.
- The Roane Alliance was awarded \$180,000 from Tennessee's ThreeStar Grant Program. These funds will be used to provide educational videos to K-12 students, create a map of Watts Bar Lake with marinas, restaurants, boat ramps, etc., and provide training and tuition to Roane State and TCAT students.
- A rare earth materials company has identified property in Roane County to build a facility to process materials and for research and development. Their project just went in front of the Roane County Environmental Review Board.
- Project Roane Meats has purchased property in the Roane County Industrial Park in Rockwood. Plans to establish and launch a small meat processing facility in Rockwood remain on track.
- Dawn graduated from the University of Tennessee- Center for Industrial Services Certified Economic Development program. This 2-year process included multiple courses, a capstone paper, and a presentation.
- The Roane Alliance is working with Civil and Engineering Consultants regarding the Roane Alloys and adjacent properties in Rockwood near the Roane County Industrial Park. The goal is to identify possible opportunities for the properties and to outline problem areas and obstacles for development.
- The Roane County Industrial Development Board purchased approximately 15 acres in Roane Regional Business and Technology Park to provide a site for future industry.



# ECD, Education & Workforce



- In partnership with Roane County schools, the Roane Alliance hosted a Nuclear Professional Development Day for over 250 elementary educators in Oak Ridge on February 13th. Sites and companies that hosted included Triso-X, ORAU, ORNL, AMSE Museum, Roane State Nuclear Program, and K-25 History Center.



## Roane County Schools Career Fair



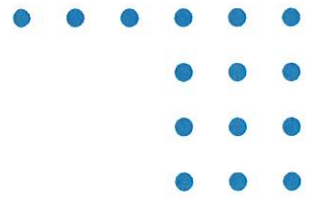
Tripled taxable property & more than doubled jobs in last 3 years

Three years ago, Roane County had around 2,000 industrial jobs total



### Since 2021

Private Capital Investment	<b>\$8.56 Billion</b>
Land Sale Proceeds	<b>\$5 Million</b>
Current County Property Value	<b>\$2.51 Billion</b>
New Jobs Announced	<b>2,972</b>

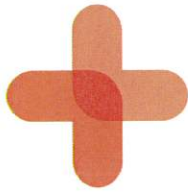


- Stacey attended the TN River Line conference where Mike Beard was honored.
- Stacey attended Tourism Day on the Hill in March where she met with elected officials and learned of new messaging for Tourism
- We assisted in hosting East Tennessee Leadership and Roane County Leadership and shared reasons Roane County is a premier travel destination in East Tennessee.
- We gathered for the opening of Portal 4 at the K-25 Stomic History Campus on April 11th.



## Occupancy Tax Numbers

FY 2026 Total thru Jan	\$113,857.29
FY 2025 Total thru Jan	\$114,688.85



# Roane Chamber

Roane Alliance



- Hannah and Tyler attended TCCE Institute, where they had the opportunity to network with other chamber professionals from across the state. They also attended sessions that focused on growing the chamber, creating events, marketing, and more.
- Meet the Candidates was held on April 2<sup>nd</sup> at Roane State Community College. This event was presented by the Roane Alliance, Leadership Roane County, Roane State, and BBTBTV. It allowed the community to meet people running for local and state offices and learn about their platforms. Thank you to everyone who came out to speak or be in attendance!
- The surprise patrol visited Leadership Roane County, Perma Fix, and the TVA Kingston Powerplant. They are going to Rockwood next, so keep your eye out to see where they show up.
- Our first New Member Luncheon was a huge success. With 9 businesses presenting and over 50 people in attendance we look forward to having these quarterly to give our new businesses an opportunity to be recognized and introduced to the community.



## Chamber Facts

Ribbon Cuttings

2025- 21  
2026-13

Business of the Month

Affordable Arctic  
Air

Members

380

# Looking Forward



Thank You to our Roane Alliance Partners: City of Harriman, City of Kingston, City of Oak Ridge, City of Rockwood, East Tennessee Economic Council, Energy Solutions, Oak Ridge Utility District, Roane County Schools, UCOR, UT Battelle/ORNL, Harriman Utility Board, TCAT Harriman, Cobalt Boats, Protomet, and Barger Precast!

Please ask Justin how your organization can partner with the Roane Alliance.

Thank you to our Executive Chamber Champions: Ut-Battelle/ORNL, CNS Y-12, Regions Bank, Coldwell Banker Jim Henry & Associates, Sutherlin Subaru, Energy Solutions, and Renaissance Terrace.



Roane Alliance  
Recap





## Loris Kim

### **Operations & Commissioning Manager, IKE Program, Orano Enrichment USA**

Loris Kim leads operations and commissioning for Orano Enrichment USA's new enrichment facility in Oak Ridge, Tennessee. In this role, he is responsible for ensuring the successful startup and operational readiness of a major advanced nuclear project.

Loris began his career as a process engineer at Orano's La Hague used nuclear fuel recycling facility in France. He later joined the company's headquarters in Paris, where he contributed to strategic and operational initiatives for the Front-End Business Group. He then relocated to Richland, Washington, where he spent 14 years in the nuclear fuel manufacturing facility, holding a range of leadership roles in operations.

He holds a master's degree in chemical engineering from ENSCM and a master's degree in process engineering from Université Montpellier II. He further expanded his expertise with a master's in business and management from ESCP Business School in Paris.



151 Lafayette Drive, Suite 401  
Oak Ridge, TN 37830



ADVISORY SERVICES | LEASING & SALES / KNOXVILLE, TN

INDUSTRIAL & LOGISTICS, MANUFACTURING SPECIALTY PROPERTY GROUP

# Brian Tapp

Senior Vice President, Knoxville, TN

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**M** +1 865 719 5703

**E** brian.tapp@cbre.com

## Clients Represented

- Tennessee Valley Authority
- Norfolk Southern
- Covenant Health
- TPA Group
- Phillips Infrastructure Holdings
- Stock Creek Properties Partnership
- City of Maryville, TN
- Regal Entertainment Group
- Siemens
- United Rentals
- Ferguson
- TeamTech
- SL America
- Subtext
- Energy Solutions

## Pro Affiliations / Accreditations

- Certified Commercial Investment Member (CCIM), Designee
- Society of Industrial and Office Realtors Member (SIOR), Designee

## Education

- Bachelor's degree in political science from the University of Tennessee, Knoxville

## Professional Experience

Brian Tapp, CCIM, SIOR, is a First President at CBRE's Knoxville office. Brian brings over nineteen years of real estate experience in industrial sales and leasing, land assemblage for development, tenant representation, corporate real estate services, and bank "other real estate owned" (OREO) dispositions.

Brian also serves a variety of non-profits and other organizations in various capacities, including acting as a board member for the Industrial Development Board of the City of Knoxville, board member of the Knoxville Chamber of Commerce, on the Government Relations Committee and Infrastructure Committee, and is an active member of the Blount Partnership. Other organizations include serving on the Executive Board of Directors for Great Smoky Mountain Council for Boy Scouts of America; and the City of Knoxville, Knoxville Knox County Planning Commission Public Stakeholder Advisory Committee. Former boards include Nucleus Knoxville, Cerebral Palsy Center, and United Way, Investment Committee.

## Significant Transactions

CLIENT	ADDRESS	TYPE	SIZE (SF)
EnergySolutions	320 JD Yarnell	Sale	192,000
TPA Group	Pawnook Farm Rd	Lease	74,460
Dominion Group	1624 Riverside Dr	Lease	63,300
Starboard Properties	305 Excellence Way	Lease	57,233
TPA Group	450 Hamilton Industrial Way	Sale	260,000
SJW Land Co.	400 Goody's Ln	Lease	326,600
SJW Land Co.	400 Goody's LN	Sale	362,299
LBMB	2525 Quality Lane, Knoxville	Lease	108,400
Confidential	Confidential	Lease	130,560
Mullins Properties	120 Flint Rd	Lease	56,700

Carpenter Creek	5101 S National Dr	Sale	77,930
Stock Creek Properties	3225 N Star Circle	Sale	142,750
DDGC, LLC	3600 Papermill Dr, Knoxville	Sale	87,788
Confidential	1295 Huntington Park Dr	Lease	195,400
Covenant Health	133 N Broadway, Knoxville	Sale	125,000
BHS Corrugated	121 W. Centre Stage, Clinton	Sale and Lease	65,000
Flex N Gate	1433 Harris Rd	Lease	50,400
Key Safety Systems	1644 Mustang Dr, Maryville	Sale	110,000
Triangle Business Park	1701 Triangle Park Dr, Maryville	Sale	123,456
Ceramaspeed	1991 McArthur Rd., Alcoa	Sale	140,260
ATCDT Corp	3015 E. Gov. John Sevier Hwy, Knoxville	Lease	171,650
Ralph Moore	6125 Riverview Crossing	Sale	130 acres
City of Maryville	Robert C. Jackson Dr, Maryville	Sale	44.52 acres

**Achievements**

Brian has earned numerous prestigious commercial real estate awards, including East TN CCIM/Knoxville Business Journal’s “Broker of the Year” award (2011 & 2012) and East TN CCIM/Knoxville Business Journal’s “Deal of the Year” award in 2011 for his work in the disposition of Belle Island Village, known as “The Island in Pigeon Forge”, a 280,000 sf festival themed development in Pigeon Forge, TN for Regions Bank. He won the “Deal of the Year” again in 2016 for his work on the acquisition of 1.9 acres assemblage on Cumberland Avenue at the University of Tennessee Knoxville Campus for Collegiate Development Group (CDG). CDG developed and built a \$45 million dollar, 140 unit, 268,254 square foot mixed-use community (student housing and retail space). Before beginning his practice in commercial real estate, Brian worked as a legislative aide to Congressman Van Hilleary and Congressman J. Randy Forbes in Washington, D.C.

**Awards**

- Q4 2024 Power Broker - Quarterly Industrial Lease
- Q4 2024 Power Broker - Quarterly Retail Lease
- Q3 2024 Power Broker - Quarterly Industrial Lease
- Q2 2024 Power Broker - Quarterly Industrial Lease
- Q3 2023 Power Broker - Quarterly Industrial Lease
- Q2 2023 Power Broker - Quarterly Retail Lease
- Q1 2023 Power Broker - Quarterly Retail Lease
- Q4 2022 Power Broker - Quarterly Industrial Lease
- Q3 2022 Power Broker - Quarterly Industrial Lease
- Q2 2022 Power Broker - Quarterly Industrial Lease
- CoStar Power Broker Award – Top Industrial Leasing Broker 2021
- CoStar Power Broker Award – Top Industrial Leasing Broker 2020 Q4
- Avison Young Circle of Excellence – Affiliate Offices Award
- East TN CCIM/Knoxville Business Journal’s “Broker of the Year” Award 2011, 2012
- East TN CCIM/Knoxville Business Journal’s “Deal of the Year” Award 2011, 2016

# **Derrick C. Phillips**

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## **Qualifications Summary**

**Proven leadership experience, ability with legal writing/research, policy drafting, legal drafting, implementation of curricula, employee/customer relations, hiring/screening, applied social work policy/practices, and interpersonal communication focusing on conflict resolution.  
Addressing real world dilemmas with real people.**

## **Education**

- **The University of Tennessee:** Master of Science- Social Work (MSSW): Organizational Leadership (Macro), Knoxville, Tennessee. Graduation 2024.
- **South College:** Bachelor of Science – Legal Studies, Knoxville, Tennessee Graduation 2017 Magna Cum Laude Honors.

## **Certification and Recognition**

- National Council for Mental Wellbeing: Mental Health First Aid (Adult)- 2025
- National Council for Mental Wellbeing: Mental Health First Aid (Youth)- 2025
- University of Tennessee: Forensic Social Work Certificate- 2024
- University of Tennessee: Veterinary Social Work Certificate- 2024
- CITI Research Program: Group 4 Fellows, Residents and Students- 2024
- The Network for Social Work Management: Human Services Management Certificate- 2024
- Phi Alpha Honor Society: Epsilon Iota Chapter (President)- 2021
- Alpha Beta Kappa- National Honor Society- 2017
- South College Student Advisory Committee: Legal Studies Representative- 2015-2016
- Who's Who Among Students in American Universities & Colleges- 2012
- Westlaw Next Westlaw Next Certifications (Fundamentals, Researching more Effectively & Productively, Litigation, and Cases)- 2011

## **Volunteer Service**

- Instructional Aide/Resource; Legal Studies, South College; Knoxville, Tennessee: 2019-Present
- Loudon County Health Improvement Council; Lenoir City, Tennessee: 2025-Present
- Tech 4 All Tennessee Board of Directors: Chairman; Harriman, Tennessee: 2025-Present.

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## Professional Experience

Tech 4 All Tennessee, Harriman, TN:

May 2025-Present

**Program Coordinator/Chairman Board of Directors** Plan, organize, and facilitate digital literacy classes and workshops for diverse audiences (ex. veterans & seniors). Coordinate and negotiate with respective community leaders in addition to stakeholders. Outreach strategies and training personnel with service delivery as the focal principle. Develop data collection and reporting for evaluation (process & outcome).

Align9, Lenoir City, TN:

January 2025- Present

**Partnership Liaison Officer** Serve as a bridge between partnerships ensuring effective communication. Create documents in the form of memorandums of understanding (MOUs). Mental health education and curriculum development. Execute negotiation and relationship building that has a positive impact among stakeholders within the recovery ecosystem and beyond.

The University of Tennessee CVSW, Knoxville, TN:

August 2023-May 2024

**University of Tennessee Center for Veterinary Social Work Internship** Conducted community outreach and networking for program evaluation. Operations development including the coordination of events, meetings, literature review, UTCVM interviews, and assisted research models for IRB approval.

- Created "Financial Resources & Resources for Animal Owners" document connecting animal owners and organizations to resources in the East Tennessee Community. Published online 12/2/23.
- Completed a "Crisis Communications" training module conflict resolution and mental health awareness for veterinary professionals.

ETHRA- ETAAAD- CREVAA, Knoxville, TN:

September 2021- December 2021

**CREVAA Internship** Processed eligible referrals from agencies by educating stakeholders, the public, victims, and families of victims about program options. Transitioned consumers from CREVAA to long-term services and support. Multi-agency CCR (Coordinated Community Response) meetings.

- Research and issue presentation to the Director of ETAAAD on "Elder Justice: Self-Determination & Self-Harm."

General Sessions Court Div. V., Knoxville, TN:

January 2015-March 2015

**Legal Studies/Judicial Internship** Served as an intern for the Honorable Tony W. Stansberry.

- Observed and documented cases heard in Civil, Bonded Arraignment, DUI, Felony, Misdemeanor and Chancery Court.
- Researched Surrender of Handgun Carry Permit, Judicial Diversion and Appeals in General Session, then issued memorandums with applicable case briefs.

Jewelry Television, Knoxville, TN:

October 2004-March 2013

**Onboarding Supervisor** Managed between 15-80 direct reports, exceeding 150 departmentally. Retention was the mission. Promoted a wide range of company policies and performance indicators.

- Developed Project Plan. Recruitment, screening, interviewing, and employee development. Implemented training modules (4) for employee development.
- Created Attrition Analysis for targeting opportunities and illustrating results of implementation.
- Led a 4-person management team to create a "Project Plan" document used departmentally.

- Learning & Development;
- Microsoft Office Programs;
- Strategic & Project Planning;
- Leadership & Team Building;
- Screening, Testing, & Hiring;

- Training Curriculum Development;
- EEOC, FMLA, HIPAA & ADA adherence;
- Inter-Agency Coordination;
- Policy & Creative Development;
- Legal Writing & Research;

- Conflict Resolution;
- GIS/Asset Mapping;
- Data Research-SPSS;
- Payroll & HR
- Community Outreach.