

## Whitlock, Mary

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**From:** Fleischaker, Rebecca  
**Sent:** Tuesday, July 21, 2015 4:41 PM  
**To:** Butler, Marianne; Hughes, Susan; MetroCouncilClerk  
**Cc:** Bilitski, Deborah; Deonarine, Keisha; Frockt, Daniel  
**Subject:** RE: Trilogy Investors, LLC DBA Trilogy Health Services LLC- Jefferson County- KBI-II-13-19648 (NAME CHANGE Trilogy Health Services, LLC)  
**Attachments:** Trilogy Health Services, LLC board summary.pdf

Hi all, sorry again for our lack of planning!

As promised, I wanted to get back to you on location. They are located at 303 N. Hurstbourne Pkwy, which is not in J-Town.

Attached is electronic version of what I submitted as fact sheet during the committee, however they amended this initial application, and wages are much higher, \$50,000 average wage instead of the listed \$30,000 average wage. Please let us know if you need any other information.

Thanks,

Rebecca Fleischaker  
Deputy Director  
Louisville Metro Dept of Economic Development  
*LOUISVILLE FORWARD*  
444 South Fifth Street, Suite 600  
Louisville, KY 40202  
(502) 574-2974  
[www.louisvilleky.gov/economicdevelopment](http://www.louisvilleky.gov/economicdevelopment)



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**From:** Elder, Michelle (CED) [<mailto:Michelle.Elder@ky.gov>]  
**Sent:** Monday, June 08, 2015 1:20 PM  
**To:** Fleischaker, Rebecca  
**Cc:** Roe, Megan (CED); Grisanti, Nick (CED)  
**Subject:** Trilogy Investors, LLC DBA Trilogy Health Services LLC- Jefferson County- KBI-II-13-19648 (NAME CHANGE Trilogy Health Services, LLC)

Rebecca,

Trilogy Investors, LLC DBA Trilogy Health Services LLC in Jefferson County is ready to go for final approval so I am requesting their local resolution. I have attached the board summary from preliminary approval on August 29, 2013 as well as Jefferson Counties support letter for your convenience. **The companies name has changed to Trilogy Health Services, LLC** so this is how the resolution will need to read. Can you please help me with this?

Also just to keep you in the loop as well (Megan has copied Keisha on the emails regarding the modifications for this project but wanted you to be aware as well) Below are the modifications that I will take to KEDFA when I request final approval of this project:

- Name change from Trilogy Investors, LLC DBA Trilogy Health Services LLC to Trilogy Health Services, LLC
- Total investment increased from \$1,100,000 to \$2,347,500
- Eligible costs increased from \$1,100,000 to \$1,761,250
- Job target increased from 25 to 125 (wage target will not change)
- The total negotiated tax incentive amount to be requested at final approval to increase from \$300,000 to \$1,300,000

Let me know if you need anything else.

Thanks,

Michelle Elder

*Michelle P. Elder*

*Kentucky Cabinet for Economic Development*

*Office of Financial Services*

*Incentive Assistance Division*

*300 West Broadway*

*Frankfort, KY 40601*

*502-782-1962*

**KENTUCKY ECONOMIC DEVELOPMENT FINANCE AUTHORITY  
KBI REPORT - PRELIMINARY APPROVAL**

**Date:** August 29, 2013  
**Approved Company:** Trilogy Investors, LLC DBA Trilogy Health Services, LLC  
**City:** Louisville **County:** Jefferson  
**Activity:** Headquarters **Prelim Resolution #:** KBI-IL-13-19648  
**Bus. Dev. Contact:** N. Grisanti **OFS Staff:** M. Elder

**Project Description:** Trilogy Investors, LLC DBA Trilogy Health Services, LLC is a provider of senior living and long-term healthcare services. The company operates 75 health campuses throughout Kentucky, Indiana, Ohio, Michigan and Illinois. Due to company growth, they are considering an expansion of their headquarters office which would include additional leadership support and enhancements to their technology infrastructure.

**Facility Details:** Expanding existing operations

**Anticipated Project Investment - Leased**

Rent  
 Building/Improvements  
 Equipment  
 Other Start-up Costs  
**TOTAL**

Eligible Costs	Total Investment
\$0	\$0
\$0	\$0
\$0	\$0
\$1,100,000	\$1,100,000
<b>\$1,100,000</b>	<b>\$1,100,000</b>

**NEGOTIATED TARGETS AND INCENTIVE AMOUNTS:**

Year	Job Target	Average Hourly Wage Target (Including Employee Benefits)	Annual Approved Cost Limitation
As of Activation Date	25	\$30.00	
1	25	\$30.00	\$30,000
2	25	\$30.00	\$30,000
3	25	\$30.00	\$30,000
4	25	\$30.00	\$30,000
5	25	\$30.00	\$30,000
6	25	\$30.00	\$30,000
7	25	\$30.00	\$30,000
8	25	\$30.00	\$30,000
9	25	\$30.00	\$30,000
10	25	\$30.00	\$30,000

**Other County Minimum Wage Requirements:**

Base hourly wage: \$10.88  
 Total hourly compensation: \$12.51

**TOTAL NEGOTIATED TAX INCENTIVE AMOUNT:**

<b>\$300,000</b>
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**Ownership (20% or more):**

Trilogy Investors, LLC      Louisville, KY

**Active State Participation at the project site:**

<u>Date</u>	<u>Program</u>	<u>Status</u>	<u>Amount</u>
May 31, 2012	KBI	Monitor	\$1,250,000

**Requested Wage Assessment / Local Participation:**

State: 3.0%

Local: 1% Louisville Metro Government

**Unemployment Rate**

County: 8.9%

Kentucky: 8.9%

**Existing Presence in Kentucky:**

Harrison County

**Special Conditions:**

The company will be required to maintain a base employment equal to the number of full-time, Kentucky resident employees as of the date of preliminary approval. The company reported 119 full-time, Kentucky resident employees as of the application date.

The company will be required to maintain 90% of the total statewide full-time, Kentucky resident employees at all company locations, excluding the site of the project, as of the date of preliminary approval.