

Bloomington Urban Enterprise Association Board Meeting

December 14, 2022

12:00 p.m.

In-Person

City Hall-1-Cityhall McCloskey Conference Room

Join Zoom Meeting

Zoom Meeting Information:

<https://bloomington.zoom.us/j/84576005312?pwd=SERpaXRLenV0U0J6dXlCNTVGVmNPUT09>

Meeting ID: 845 7600 5312

Passcode: 953182

One tap mobile

+16469313860,,84576005312# US

+19292056099,,84576005312# US (New York)

Roll Call

I. Approval of Minutes (November 2022)

II. Reports from Officers and Committees

- Director's Report
- Financial Reports

III. New Business

- ESD Staffing agreement
- Budget Proposal from FMCCSC - 15K

IV. Unfinished Business

- BUEA Budget review & approval
- First Drafts of new grant proposals

V. General Discussion

VI. Adjournment

The next BUEA Meeting will be on Wednesday, January 11, 2022

Auxiliary aids for people with disabilities are available upon request with adequate notice. Please call 812-349-3429 or e-mail human.rights@bloomington.in.gov.

Bloomington Urban Enterprise Association Board Meeting

November 9, 2022

12:00 p.m.

In Person

City Hall-1-Cityhall McCloskey Conference Room

The meeting was called to order at 12:04 pm

Roll Call - De de la Rosa

- Paul Ash
- Julie Donham
- Jackie Yenna (Absent)
- Kate Rosenberger
- Mary Morgan
- Alex Crowley
- Felisa Spinelli
- Scott Wright (Absent)
- Karin St. John
- Chaz Mottinger (Staff Liaison)
- Holly Warren (Staff Liaison)
- De de la Rosa (Executive Director/ Virtual)
- Liza Rivas (ESD Fellow)
- Cheryl Gilliland (Director of Auditing and Financial Systems, Controllers Office)

I. Approval of Minutes (2022)

*Motion to approve October 2022 minutes by Paul Ash. Motion seconded by Kate Rosenberger. The October minutes were unanimously approved.

II. Reports from Officers and Committees

- Director's Report
 - Grant Cycle Software
 - Staff is working to create grant cycles for 2023 BUEA Scholarships and Grants in the new ESD department grant management software system.
 - Resident Scholarships
 - Staff is requesting the Board increase the 2022 Resident Scholarship budget by \$3,000 to cover the remainder scholarship amount of the year's eligible applicants. The total amount that can be requested by applicants is \$3,000. However, staff does not believe that \$3,000 will be spent because the amount awarded is dependent on the cost of the class applicants are receiving funding for.

*Motion to approve a \$3,000 increase in the Resident Scholarship Expenditures for the 2022 year made by Karin St. John. Motion seconded by Paul Ash. The motion was unanimously approved.

- Money Market Account
 - Does the BUEA Board want to keep this account?
- MCCSC additional funding
 - The staff has contacted MCCSC about their plan for the additional \$15,000 the BUEA

agreed to fund for programming.

- Financial Reports
 - The total BUEA assets are currently at \$3.064 million.
 - Professional Service Issues
 - The city is currently dealing with Quickbook access issues they are fixing. ESD was going to work with a third party to help service the loans. However, the total cost per year for this service would be about \$30,000, which is too high for the serviced loans.
 - Repayment Process
 - Staff is currently analyzing where businesses stand on their loan repayment process. Some businesses have struggled with the repayment process, and staff wants to be as flexible as possible to accommodate businesses' current financial issues. Staff wants to prevent businesses from going into default with the understanding that there are rules staff are working within.

*Motion to approve October 2022 Financials by Karin St. John Motion seconded by Paul Ash. Financials were unanimously approved.

III. New Business

- Preliminary Budget Review
 - The 2023 BUEA budget is an average of previous BUEA budgets from 2020, 2021, & 2022. The EZID income has significantly increased by over \$200,000 due to the Catalent & Cook EZID. The BUEA will have approximately \$250,000 in net income. Staff is developing grant proposals for the Board to review for the 2023 year. Some grant proposal ideas include safety and security, ADA accessibility, building renovation, environmental sustainability, and technology modernization grants.
 - The board would like an unbudgeted line amount for new proposed grants to see which ones do well in 2023 and continue in the future. The board would like for staff to develop one-pagers for the current grants to answer general questions about who is eligible. How many times can someone apply for that grant? What are the requirements for the grant?
 - The Board suggests adding a line for unbudgeted grants with a total of \$150,000 so that staff can pull from this budget line for all the new grants proposed in 2023.
 - The Board also would like to standardize the MCCSC grant to \$50,000 annually. Increase Resident Scholarships to \$15,000 and Zone Art Grants to \$50,000.
 -

*Budget will be approved in Dec 2022

IV. Unfinished Business

- No Unfinished Business

V. General Discussion

- No General Discussion

VI. Adjournment

-The meeting adjourned at 1:05 pm

The next BUEA Meeting will be on Wednesday, December 14, 2022

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Bloomington Urban Enterprise Association

Profit & Loss

November 2022

	<u>Nov 22</u>
Ordinary Income/Expense	
Income	
Business Zone Loan Interest	176.68
Total Income	176.68
Expense	
Bank Service Charges	5.00
Grants	
Facade Grants	20,000.00
Zone Arts Grants	1,000.00
Total Grants	21,000.00
Total Expense	21,005.00
Net Ordinary Income	-20,828.32
Other Income/Expense	
Other Income	
Interest Income	184.25
Total Other Income	184.25
Net Other Income	184.25
Net Income	<u><u>-20,644.07</u></u>

Bloomington Urban Enterprise Association
Profit & Loss Budget vs. Actual
January through November 2022

	Jan - Nov 22	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Income				
AIEZ Fees Refunded	17,466.51	12,000.00	5,466.51	145.6%
Business Zone Loan Interest	2,026.53	1,546.00	480.53	131.1%
EZID Loan Program Interest	0.00	37,000.00	-37,000.00	0.0%
Late Fees - Zone Loans	76.22			
Zone Membership Fees	464,535.28	262,867.00	201,668.28	176.7%
Total Income	484,104.54	313,413.00	170,691.54	154.5%
Expense				
Advertising and Promotion	0.00	1,000.00	-1,000.00	0.0%
Bank Service Charges	59.99	0.00	59.99	100.0%
Grants				
City Art Program	0.00	30,000.00	-30,000.00	0.0%
Dimension Mill Zone Day Passes	1,000.00	1,000.00	0.00	100.0%
Facade Grants	22,350.00	40,000.00	-17,650.00	55.9%
Grants-Miscellaneous				
SBDC	45,000.00	45,000.00	0.00	100.0%
Grants-Miscellaneous - Other	0.00	0.00	0.00	0.0%
Total Grants-Miscellaneous	45,000.00	45,000.00	0.00	100.0%
Lemonade Day	2,500.00	2,500.00	0.00	100.0%
Recover Forward Grants	2,344.00	0.00	2,344.00	100.0%
School Grants	0.00	35,000.00	-35,000.00	0.0%
Zone Arts Grants	14,558.00	80,000.00	-65,442.00	18.2%
Grants - Other	3,250.00			
Total Grants	91,002.00	233,500.00	-142,498.00	39.0%
Insurance Expense	3,506.00	3,500.00	6.00	100.2%
Miscellaneous Expense	754.00	500.00	254.00	150.8%
Payroll Expenses	0.00	8,000.00	-8,000.00	0.0%
Professional Fees				
Accounting	0.00	2,500.00	-2,500.00	0.0%
Management	0.00	40,000.00	-40,000.00	0.0%
Project Administration	0.00	12,210.00	-12,210.00	0.0%
Total Professional Fees	0.00	54,710.00	-54,710.00	0.0%
Scholarships				
Business Scholarships	3,152.42	5,000.00	-1,847.58	63.0%
DEI Training Scholarships	3,500.00	15,000.00	-11,500.00	23.3%
Resident Scholarships	7,601.13	10,500.00	-2,898.87	72.4%
Total Scholarships	14,253.55	30,500.00	-16,246.45	46.7%
Void	0.00	0.00	0.00	0.0%
Total Expense	109,575.54	331,710.00	-222,134.46	33.0%
Net Ordinary Income	374,529.00	-18,297.00	392,826.00	-2,046.9%
Other Income/Expense				
Other Income				
Interest Income	1,358.63	1,240.00	118.63	109.6%
Total Other Income	1,358.63	1,240.00	118.63	109.6%
Net Other Income	1,358.63	1,240.00	118.63	109.6%
Net Income	375,887.63	-17,057.00	392,944.63	-2,203.7%

Bloomington Urban Enterprise Association

Balance Sheet

As of November 30, 2022

	Nov 30, 22
ASSETS	
Current Assets	
Checking/Savings	
Cash & Cash Equivalents	
First Financial Bank	
FFB - Checking	-5,149.51
FFB - Money Market	22.37
FFB - Savings	2,261,794.56
Total First Financial Bank	2,256,667.42
German American Bank	215,513.11
IU Credit Union	203,459.51
Peoples State Bank	104,240.24
Total Cash & Cash Equivalents	2,779,880.28
Total Checking/Savings	2,779,880.28
Total Current Assets	2,779,880.28
Other Assets	
Notes Receivable - Long Term	
Big Brothers Big Sisters	21,983.17
Big Time Trading	21,983.07
Blooming Pets Alive	10,000.00
BTown Beauty Supply	12,886.45
Gaian Hands	6,155.26
KC Designs	17,587.25
Lash Envy	4,545.29
Michael's Uptown Cafe	6,944.30
My Fin, The Tap	8,842.31
My Sport's Locker	50,000.00
PALS	21,941.51
Red Tire Cab	11,518.92
Sew Secret	4,396.04
Spiral Bodies	16,707.20
Vanishing Aesthetics	44,976.14
Total Notes Receivable - Long Term	260,466.91
Total Other Assets	260,466.91
TOTAL ASSETS	3,040,347.19
LIABILITIES & EQUITY	
Equity	
Opening Balance Equity	1,565,019.23
Unrestricted Net Assets	1,099,440.33
Net Income	375,887.63
Total Equity	3,040,347.19
TOTAL LIABILITIES & EQUITY	3,040,347.19

**Bloomington Urban Enterprise Association
Emerging Workforce Technological Education Grant Application
2022-2023 School Year – Grant Proposal**

Organization Name: Foundation of Monroe County Community Schools
Address: 315 North Drive, Bloomington IN 47401
Contact Name: Cyrilla Helm
Phone: 812 330 7700 ext 50065
Email: mhelm@mccsc.edu
Total funding: \$15,000

Thank you very much for the opportunity to submit an additional funding request to support students at Fairview, Summit, Templeton, and Tri North. Your support to these BUEA zone enrollment schools is dramatically impacting education for these students. Transportation records show that there are approximately 720 MCCSC students that live in the BUEA zone. You are ensuring they have the resources needed to build confidence and academic success. Below are requests from each of these schools.

We generally break the request by school but for this extra funding we will present the curriculum need in total. It will be driven across one of more of these schools.

Grant Need (1) VMath – Templeton, Summit
Amount: \$7,000

VMath has been an effective intervention tool at Fairview. With this funding we will expand V-Math to Templeton and Summit. VMath is a targeted math intervention program for struggling students in **grades 2–8** that provides additional opportunities to master critical math concepts and skills. VMath delivers essential content using strategies proven to accelerate and motivate at-risk students.

The pandemic has put many children behind in foundational math skills. The critical need at Templeton and Summit is in grades 3 and 4. There are approximately 300 students who will benefit from the VMath program. With this funding we will purchase VMath licenses at each school to support intervention needs. The staff will monitor student progress and academic growth. Student data during this pilot period will help us evaluate the academic impact and if the program could serve as a sustainable program for intervention needs at both schools.

Grant Need (2) Writing Rope - Fairview, Templeton, Summit
Amount: \$4,200

A large part of our first request was focused on reading resources to help struggling students develop reading skills. An equally important component of the English Language Arts curriculum is teaching children how to become skilled writers.

The Writing Rope- A Framework for Explicit Writing Instruction in All Subjects by Jan Sedita is an excellent resource that will help our educators build a framework for writing instruction. These funds will purchase 100 copies of this book for faculty at Fairview, Summit, and Templeton.

Our literacy team and coaches will use this book to develop an integrated framework that effectively teaches writing skills throughout all areas of curriculum. It should be noted that instruction for many skills that support writing also support reading comprehension.

With this request we want to ensure that our curriculum is balanced to develop both reading and writing skills.

Grant Need (3) **Black Violin – Fairview, Templeton, Summit, TriNorth**
Amount: **\$3,800**

Black Violin is an American hip hop duo from Fort Lauderdale, Florida comprising two classically trained string instrumentalists, Kev Marcus plays the violin, and Wil B. plays the viola.

The duo will perform at the IU Auditorium in February 2023. The band uses their unique blend of classical and hip-hop music to overcome stereotypes while encourages people of all ages, races and economic backgrounds to join together to break down cultural barriers.

MCCSC would like to take students participating in our string programs to the performance. We believe that giving our youth accessibility to this type of performance will empower them to continue school music programs while inspiring their creativity and innovation.

Your funding will support 70 to 80 students attending Fairview, Summit, Templeton, and TriNorth to attend the performance. We are still working on details of ticket prices and transportation costs but feel this is a good estimate of the total cost.

AGREEMENT
between the
CITY OF BLOOMINGTON, INDIANA
and the
BLOOMINGTON URBAN ENTERPRISE ASSOCIATION, INC.

This agreement, entered into this ____ day of December, 2022, by and between the City of Bloomington, Indiana (“City”) and the Bloomington Urban Enterprise Association, Inc. (“BUEA”), WITNESSETH THAT:

WHEREAS, the BUEA is an urban enterprise association pursuant to Indiana Code 5-28- 15 with the authority to administer the Bloomington Urban Enterprise Zone (the “Zone”), within its respective boundaries as approved by the State Enterprise Board; and

WHEREAS, the City and the BUEA share the goals of encouraging appropriate development, redevelopment and employment in the Zone through use of the statutory tools provided in Indiana Code 5-28-15 and through coordination and cooperation with Zone businesses and residents; and

WHEREAS, the BUEA needs assistance in its administrative functions to perform its duties, and the City is willing and able to perform those duties;

NOW, THEREFORE, IT IS AGREED AS FOLLOWS:

1. Term of Agreement. This Agreement shall become effective upon execution and continue through December 31, 2023, unless terminated prior to that date pursuant to Paragraph 10 or extended pursuant to Paragraph 12 herein.

2. Scope of Services to be Provided by City. The City agrees, subject to Paragraph 6 herein, to perform reasonable services that contribute to the goals of the BUEA and the Zone as described in IC 5-28-15 and the BUEA’s bylaws and articles of incorporation, subject to the provisions of this Agreement. Services to be provided may include, but are not limited to, the following:

- Assign an Executive Director to the BUEA to act as primary point of contact for all inquiries regarding BUEA business;
- Staff the BUEA by performing all administrative and professional duties required;
- Coordinate activities necessary for specific projects to be undertaken and administered;
- Insure the BUEA for all of its activities; and
- Coordinate activities required to meet state statutory guidelines.

The BUEA’s Board of Directors shall have final decision-making authority regarding Zone and BUEA matters and expenditures of BUEA funds.

3. Other Contracts. The BUEA may enter into contracts with entities or individuals other than the City for performance of specific actions related to the BUEA and Zone that are not actions to be performed by the City hereunder. The BUEA agrees to provide City with a copy of any such contract and to keep the City informed of the duties and activities to be performed under that contract.

4. Staffing. The Economic and Sustainable Development Department (ESD) shall have primary responsibility for performance of services for the BUEA. ESD will seek and coordinate assistance from other City departments and employees as needed and as available.

5. Funding. The BUEA shall pay the City an amount not to exceed Forty Thousand Dollars (\$40,000) for services provided by ESD and any other City Department staff pursuant to this Agreement for 2022. ESD shall bill the BUEA in equal quarterly installments of Ten Thousand Dollars (\$10,000.00) for the services performed.

For 2023, the BUEA shall pay the City Forty-Five Thousand Dollars (\$45,000), in equal quarterly installments of Eleven Thousand Two Hundred Fifty Dollars (\$11,250.00) for the services performed pursuant to this Agreement

6. Supervision and Independent Contractor Status. The status of City employees providing services pursuant to this Agreement as employees of the City of Bloomington shall not be affected in any way by this Agreement. Said employees shall be subject solely to supervision by their City of Bloomington supervisors and in accordance with the City of Bloomington personnel policies, subject to the authority of the BUEA Board of Directors to render decisions about Zone and BUEA programs and expenditures as provided herein.

The City shall only be obligated to perform services under this Agreement to the extent that such services further the policies and goals of the City as well as the BUEA. The City reserves the right to refuse to perform activities requested by the BUEA Board of Directors if the Mayor determines that such activities conflict with the City's plans, policies or goals.

During the entire term of this Agreement, the City shall be an independent contractor, and in no event shall any of its personnel, agents or sub-contractors be construed to be, or represent themselves to be, employees of the BUEA. The City shall be solely responsible for the payment and reporting of all employee and employer taxes, including social security, unemployment and any other federal, state or local taxes required to be withheld from employees or payable on behalf of employees.

7. Insurance and Indemnity. The City shall maintain adequate liability insurance to cover the services to be performed by City personnel hereunder through the City of Bloomington's blanket liability policy. The City shall also maintain on the BUEA's behalf general liability insurance and bonds in the amount of \$15,000 on its Treasurer and on any other person who has the authority to sign checks on behalf of the BUEA.

BUEA shall indemnify and hold harmless the City against all claims, actions, damages, liability and expenses, including reasonable attorneys' fees and court costs, which may occur as a result

of acts or omissions by its officers, directors, agents, employees, successors and assigns, in the performance of this Agreement.

8. Attorney's Fees. If any action is brought to enforce this Agreement, the prevailing party shall be entitled to recover reasonable costs of enforcement, including court costs and attorney fees.

9. Records. Each party shall retain all records related to this Agreement for a period of at least three years from the termination of this Agreement. Each party shall permit the other access to all records relating to this Agreement at all reasonable times for review and audit purposes.

10. Termination of Agreement. This agreement may be terminated in whole or in part by either party at any time for any reason by sending the other party written notice via certified mail, return receipt requested, at least thirty (30) days prior to the date of termination. Termination of the Agreement shall not affect any liabilities that accrued between the parties prior to the termination.

11. Notice to Parties. Whenever any notice, statement or other communication shall be sent to the BUEA or City, it shall be sent to the person and address named below, unless otherwise advised in writing by a party:

Notice to the City: City of Bloomington Legal Department
401 N. Morton St., Suite 220
Bloomington, IN 47402

Notice to BUEA: Julie Donham, President
Bloomington Urban Enterprise Association
P.O. Box 100
Bloomington, IN 47402

12. Extension and Renewal of Agreement. This Agreement may be renewed, renegotiated or extended upon its expiration by mutual written consent of the parties.

13. Governing Laws. This agreement shall be construed in accordance with and governed by the laws of the State of Indiana and suit, if any, must be brought in the State of Indiana.

13. Severability. If any part of this Agreement is invalid or unenforceable under any statute, regulation, ordinance, executive order or other rule of law, such term shall be deemed reformed or deleted, but only to the extent necessary to comply with such statute, regulation, ordinance, order or rule and the remaining provisions of this agreement shall remain in full force and effect.

[Signature Page Follows]

In witness of acceptance of all conditions contained in this agreement, the parties execute this agreement on the date entered on the first page hereof.

BLOOMINGTON URBAN ENTERPRISE ASSOCIATION

BY:

Julie Donham, President

CITY OF BLOOMINGTON, INDIANA

BY:

John Hamilton, Mayor

2023 BUEA Budget

Second Draft 12/8/22

	2021				2022				2023
	Budget	2021 by EOY	var.	Carryover	Budget	2022 by EOY	var.	Carryover	Budget
INCOME									
Refunded AIEZ fee	\$12,000.00	\$18,925.02	(\$6,925.02)	\$0.00	\$12,000.00	\$ 19,984.18	(\$7,984.18)	\$0.00	\$18,500.00
Business Loan Interest Income	\$268.71	\$108.37	\$160.34	\$0.00	\$1,546.00	\$1,849.85	(\$303.85)	\$0.00	\$1,600.00
EZID loan program interest	\$50,000.00	\$36,999.19	\$13,000.81	\$0.00	\$37,000.00	\$79,965.00	(\$42,965.00)	\$0.00	\$60,000.00
EZID Income (zone membership fees)	\$386,795.33	394,733.09	(\$7,937.76)	\$0.00	\$262,867.00	516,578.76	(\$253,711.76)	\$0.00	\$500,000.00
RRF Loan Interest	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,391.69	(\$2,391.69)	\$0.00	\$3,904.00
Late Fees - Zone Loans	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$76.22	(\$76.22)	\$0.00	\$0.00
Interest Income	\$6,000.00	\$901.07	\$5,098.93	\$0.00	\$1,240.00	\$1,240.00	\$0.00	\$0.00	\$1,240.00
	\$455,064.04	\$451,666.74	\$3,397.30	\$0.00	\$314,653.00	\$622,085.70	(\$307,432.70)	\$0.00	\$585,244.00
EXPENSE									
ADMINISTRATIVE									
Advertising/Marketing	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,500.00
Bank Service charges	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$54.99	(\$54.99)	\$0.00	\$80.00
Professional Services- Management	\$40,000.00	\$40,000.00	\$0.00	\$0.00	\$40,000.00	\$45,000.00	(\$5,000.00)	\$0.00	\$45,000.00
Insurance Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,506.00	(\$3,506.00)	\$0.00	\$3,500.00
Accounting & Tax Services	\$2,500.00	\$1,000.00	\$1,500.00	\$0.00	\$2,500.00	\$0.00	\$2,500.00	\$0.00	\$2,500.00
Marketing Consultant	\$0.00	\$0.00	\$0.00	\$0.00	\$8,000.00	\$0.00	\$8,000.00	\$0.00	\$10,000.00
Postage/Printing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subscriptions/Dues	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Professional Bonds	\$2,250.00	\$3,382.00	(\$1,132.00)	\$0.00	\$3,500.00	\$0.00	\$3,500.00	\$0.00	\$3,500.00
Project administration	\$12,210.00	\$12,210.00	\$0.00	\$12,210.00	\$12,210.00	\$0.00	\$12,210.00	\$0.00	\$12,210.00
Miscellaneous Expenses	\$500.00	\$0.00	\$500.00	\$0.00	\$500.00	\$0.00	\$500.00	\$0.00	\$2,500.00
Sub-Total	\$58,460.00	\$44,382.00	\$14,078.00	\$12,210.00	\$67,710.00	\$48,560.99	\$19,149.01	\$0.00	\$80,790.00
GRANTMAKING BUDGET									
Education:									
School Grants	\$35,000.00	\$35,000.00	\$0.00	\$0.00	\$35,000.00	\$0.00	\$35,000.00	\$0.00	\$50,000.00
Resident Scholarships	\$10,500.00	\$9,000.00	\$1,500.00	\$0.00	\$10,500.00	\$7,601.13	\$2,898.87	\$0.00	\$15,000.00
Lemonade Day	\$2,500.00	\$2,500.00	\$0.00	\$0.00	\$2,500.00	\$2,500.00	\$0.00	\$0.00	\$2,500.00
Sub-Total	\$48,000.00	\$46,500.00	\$1,500.00	\$0.00	\$48,000.00	\$10,101.13	\$37,898.87	\$0.00	\$67,500.00
Education and Entrepreneurship:									
Business Scholarship Program	\$5,000.00	\$4,669.87	\$330.13	\$0.00	\$5,000.00	\$3,152.42	\$1,847.58	\$0.00	\$10,000.00
SBDC/Cook Center	\$30,000.00	\$45,000.00	(\$15,000.00)	\$0.00	\$45,000.00	\$0.00	\$45,000.00	\$0.00	\$45,000.00
Dimension Mill Zone day passes	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00
DEI Scholarship	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,500.00	(\$3,500.00)	\$0.00	\$15,000.00
Unbudgeted Grants	\$5,000.00	\$15,000.00	(\$10,000.00)	\$0.00	\$15,000.00	\$3,500.00	\$11,500.00	\$0.00	\$20,000.00
Sub-Total	\$41,000.00	\$65,669.87	(\$24,669.87)	\$0.00	\$66,000.00	\$11,152.42	\$54,847.58	\$0.00	\$91,000.00
Arts and Culture:									
City Art Program	\$30,000.00	\$30,000.00	\$0.00	\$0.00	\$30,000.00	\$0.00	\$30,000.00	\$0.00	\$20,000.00
Zone Art Grants	\$40,000.00	\$40,000.00	\$0.00	\$40,000.00	\$80,000.00	\$13,558.00	\$66,442.00	\$0.00	\$40,000.00
Historic Façade Grant	\$30,000.00	\$16,338.75	\$13,661.25	\$0.00	\$40,000.00	\$22,000.00	\$18,000.00	\$0.00	\$50,000.00
Unbudgeted Grants	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,250.00	(\$3,250.00)	\$0.00	\$20,000.00
Sub-Total	\$70,000.00	\$56,338.75	\$13,661.25	\$40,000.00	\$120,000.00	\$38,808.00	\$81,192.00	\$0.00	\$130,000.00
Zone Improvement Grants									
Small Business Safety & Security	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20,000.00
Business Building improvement	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20,000.00
Home Improvement	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00
Home Accessibility Modification	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00
Business Accessibility Modification	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00
Resident Child Care Grant	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30,000.00
Environmental sustainability	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00
Tech Modernization & Software	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20,000.00
Sub-Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150,000.00
Grant Making Budget Sub-Total	\$159,000.00	\$168,508.62	(\$9,508.62)	\$40,000.00	\$234,000.00	\$60,061.55	\$173,938.45	\$0.00	\$438,500.00
ONE-TIME EXPENSES									
Rapid Response Grantmaking									
Emergency Arts Grants	\$65,025.00	\$42,600.00	\$22,425.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Business Scholarships	\$10,800.00	\$0.00	\$10,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
One-Time Budget Sub-Total	\$75,825.00	\$42,600.00	\$33,225.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total income	\$455,064.04	\$451,666.74	\$3,397.30	\$0.00	\$314,653.00	\$622,085.70	(\$307,432.70)		\$585,244.00
Total expenditures	\$293,285.00	\$255,490.62	\$4,569.38	\$0.00	\$301,710.00	\$108,622.54	\$193,087.46		\$519,290.00
Net income	\$161,779.04	\$196,176.12			\$12,943.00	\$513,463.16	\$12,210.00		\$65,954.00

Grant Cycle Planning 2023 (First Draft)

Education:					
Grant	Total funds allotted	Cycle description	Grant open date	Grant closing date	Award distribution date
School Grants	\$50,000.00		One time distribution		
Resident Scholarships	\$15,000.00	Biannual cycles	Jan 15	Feb 15	March
			August 15	Sept 15	October
Lemonade Day	\$2,500.00		One time distribution		
Sub-Total	\$67,500.00				
Entrepreneurship:					
Grant	Total funds allotted	Cycle description	Grant open date	Grant closing date	Award distribution date
Business Scholarship Program	\$12,000.00	biannual	Jan 15	Feb 15	March
			August 15	Sept 15	October
Ivy Tech/SBDC/Cook Center	\$45,000.00		one time distribution		
Dimension Mill Zone day passes	\$1,000.00		one time- passes distributed throughout the year		
DEI Scholarship	\$12,000.00	Quarterly	January 7	Feb 1	March
			March 7	April 1	May
			June 7	July 1	August
			September 7	October 7	November
Unbudgeted Grants	\$20,000.00		TBD		
Sub-Total	\$90,000.00				
Arts and Culture:					
Grant	Total funds allotted	Cycle description	Grant open date	Grant closing date	Award distribution date
City Art Program	\$20,000.00		One time distribution - Trades District Installation		
Zone Art Grants					
<i>Arts Project Support Grants</i>	\$40,000.00	Annual	February	March	April-May
<i>Emerging Artist Grants</i>		Annual	May	June	July
<i>Operating Support Grants</i>		Annual	July	August	September
<i>Emerging Artist Public Art Grants</i>		annual	September	october	November
Historic Façade Grant	\$50,000.00	Annual	April	June	September
Unbudgeted Grants	\$20,000.00		TBD		
Sub-Total	\$130,000.00				
Zone Improvement Grants					
Grant	Total funds allotted	Cycle description	Grant open date	Grant closing date	Award distribution date
Safety & Security	\$20,000.00				
Business Building Improvement	\$20,000.00				
Home Improvement	\$15,000.00		Cycles to begin mid Q2 - early Q3		
Home Accessabilty Modification	\$15,000.00				
Business Accessabilty Modification	\$15,000.00				
<i>Resident Child Care Grant</i>	\$30,000.00				
<i>Environmental sustainability</i>	\$15,000.00		Cycles to begin mid Q3 - early Q4		
<i>Tech Modernization & Software</i>	\$20,000.00				
Sub-Total	\$150,000.00				
Grant Making Budget Sub-Total	\$427,500.00				

Proposed Grant Additions for 2023

1. BUEA Small Business Safety and Security Grant
2. BUEA Business Building Improvement Grant
3. BUEA Home Improvement Grant
4. BUEA Business Owners Accessibility Modifications Grant
5. BUEA Home Owners Accessibility Modifications Grant
6. BUEA Resident Child Care Grant

1. BUEA Small Business Safety and Security Grant

FIRST DRAFT

Safety & Security

I. Purpose

- A. To improve the overall safety, security, and perception of the BUEA, ESD proposes a safety and security grant for small business owners whose businesses have been a victim of a crime or those who would like to improve the overall security of their business. Studies show that well-lit areas and areas foreseen secure have lower crime rates. With the recent demolition of the IU Health Hospital site, among other areas of construction in the zone, there has been an increase in vandalism, loitering, and trespassing. EZ small business owners have voiced concerns about increased crime and violence in the EZ, forcing business owners to incur unexpected security equipment costs. **Approval for this grant will rely on financial need.**

II. Intended Outcome

- A. Provide Zone residents and business owners confidence in the safety and security of the community.

III. Proposed Amount

- A. \$20,000 out of \$150,000 unbudgeted grants
 1. No matching - grant is based on financial need

IV. Proposed Guidelines

- A. Application Requirements
 1. Applicant must fill out BUEA Small Business Safety and Security Grant Application on Survey Apply
 2. Applicants must attach proof of business address, i.e., utility bill, the current lease, or deed.
 3. Applicants must briefly describe their business security system project
 4. A business security system project must have one or more primary purposes:
 - a) Crime reduction
 - b) Theft prevention
 - c) Vandalism prevention
 - d) Improved perception of safety
 5. Once approved, the Applicant must attach proof of purchase for reimbursement.
 6. An approved security system must be installed entirely within the funding period.
 7. Applicants are limited to a **one-time-only** grant award
 8. The applicant is eligible for up to a total project cost with a ceiling of \$3,000 per grant.
 9. Assumption
 - a) **This grant may not be used to support the purchase of weapons or devices that may cause physical harm to humans or animals.**
 - b) **The Board holds the right not to approve any project they deem unsuitable for this grant.**

<https://www.delawarepublic.org/delaware-headlines/2020-12-04/local-nonprofit-works-to-light-the-way-to-safer-stronger-communities>

*** POTENTIAL Large project BUEA could adopt

2. BUEA Business Building Improvement Grant

FIRST DRAFT

Building Improvement

I. Purpose

- A. To improve the physical condition of business buildings in the EZ and promote economic vitality and beautification of the community. Structural integrity and maintenance of facilities are essential to avoid severe damages and financial losses for small business owners. This grant aims to assist small business owners in updating and improving internal and external visual improvements, preservation, and structural integrity. **Approval will rely on financial need.**

II. Proposed Amount

- A. \$20,000 out of \$150,000 unbudgeted grants
 1. One award with a max amount of \$7,500
 2. Additional awards of various amounts are available but at most \$2500

III. Intended Outcome

- A. The BUEA's main objectives for the grant program are to assist business owners with visual improvements, historic preservation, their facilities' structural integrity, and the community's overall beautification.

IV. Proposed Guidelines

- A. Application Requirements
 1. Applicants must fill out the BUEA Business Building Improvement Grant application on Survey Apply!
 2. Applicant must attach a "before" picture.
 3. Applicants must attach proof of business address (utility bill, current lease, deed, etc.)
 4. Applicants must briefly describe their building improvement project and the contractor's receipt or invoice for the project from the contractor.
 5. Projects eligible for gran approval include exterior painting/cleaning, historical restoration, awnings, roofs, guttering, and replacing windows. Ineligible projects include signage and sidewalks. Exterior improvements must follow the style approved in the downtown design plan. A Certificate of Appropriateness must be obtained before starting work if the building is in a historic district.
 6. BUEA will cover 75% of the project cost with a ceiling of \$7,500 for a pre-approved building project.
 7. Work on the property can start after application approval.
 8. A cost estimate and a "before" photo accompany the application and include plans and all other pertinent information regarding project costs. Assessments must consist of materials/product list breakdowns.
 9. A contractor registered with the city must do construction work, and any necessary permits must be obtained before applying.
 10. BUEA will rebate the property owner after work is complete, and the applicant provides a final bill, copies of canceled checks for the applicant's half, and an "after" photo of the completed work.

3. BUEA Home Improvement Grant

FIRST DRAFT

Building Improvement

I. Purpose

A. To support the beautification and structural integrity of homes in the BUEA. Structural integrity and building maintenance are essential to avoid severe damage to properties. This grant aims to assist homeowners facing economic hardship who need to update and improve their property building's internal and external renovations, preservation, and structural integrity. **Approval for this grant will rely on financial need.**

II. Proposed Amount

A. \$15,000 out of \$150,000 unbudgeted grants
1. Three grants with a max of \$5000

III. Intended outcome

A. The BUEA's main objectives for the grant program are visual improvements and structural integrity.

IV. Proposed Guidelines

A. Application Requirements

1. Applicant must fill out BUEA Home Improvement Grant application along with a "before" picture.
2. Applicants must attach proof of home ownership address, i.e., current proof of mortgage payment or deed.
3. Applicants must briefly describe their building improvement project and provide the contractor's quote or invoice.
4. Eligible projects include exterior painting, cleaning, awnings; roofs; guttering, and replacing windows. Exterior improvements must follow the style approved in the downtown design plan. A Certificate of Appropriateness must be obtained before starting work.
5. BUEA will cover 75% of the project cost with a ceiling of \$5,000 for a pre-approved building project.
6. Work on the property can start after application approval.
7. A cost estimate and a "before" photo accompany the application and include plans and all other pertinent information regarding project costs. Assessments must consist of materials/product list breakdowns. The owner makes a selection of contractors.
8. BUEA will rebate the property owner after work is complete. The applicant provides a final bill, copies of canceled checks for the applicant's half, and an "after" photo of the completed work.

4. BUEA Businesses Accessibility Modifications Grant

FIRST DRAFT

Accessibility

I. Purpose

- A. The Accessibility Modification Program provides grant-based assistance for accessibility improvements to the homes of individuals with permanent disabilities to make home improvements to make their homes accessible for their needs. Businesses may also apply for funding to make their small businesses ADA accessible and promote inclusive practices for people with disabilities.
- B. This grant aims to improve the BUEA's social and physical environment through accessibility modifications. This grant intends to help business owners complete ADA modifications that do not meet the requirements due to grandfathered plans. Businesses can use the funding to update their ADA-accessible areas, signage, low shelves, restroom accessibility, & parking space. **Approval for this grant will rely on financial need.**

II. Proposed Amount

- A. \$15,000 of \$150,000
 1. Three grants with a max of \$5,000

III. Intended outcome

- A. To create a more accessible BUEA for people with disabilities, so they can better enjoy Bloomington amenities and better meet their needs.

IV. Proposed Guidelines

- A. Application Requirements
 1. Applicants must fill out the BUEA Business Owners Accessibility Modifications Grant application and pictures of the area they intend to modify.
 2. Applicants must attach proof of business ownership address, such as a utility bill, lease, or deed.
 3. Applicants must briefly describe their accessibility modification project and the contractor's receipt or invoice.
 4. Eligible projects include improving accessible areas and signage, low shelves, restroom accessibility, & parking space.
 5. BUEA will cover 75% of the project cost with a ceiling of \$5,000 for a pre-approved accessibility modifications project.
 6. Work on the property can start after application approval.
 7. A cost estimate and a "before" photo accompany the application and include plans and all other pertinent information regarding project costs. Assessments must consist of materials/product list breakdowns. The owner makes a selection of contractors.
 8. BUEA will rebate the property owner after work is complete. The applicant provides a final bill, copies of canceled checks for the applicant's half, and an "after" photo of the completed work.

5. BUEA Homeowner Accessibility Modifications Grant

FIRST DRAFT

Accessibility

I. BUEA Need

- A. Business owners must have their building meet ADA compliance to be in business and support people with physical disabilities. ADA compliance for businesses can cost upwards of \$10,000, which may burden business owners. **Therefore, approval for this grant will rely on financial need.**

II. Purpose

- A. The objective of the Accessibility Modifications Program is to encourage the preservation of the City's existing housing stock by providing owner-occupied households with a person(s) with a permanent disability the funding needed to make accessibility improvements to their homes.
- B. This grant aims to improve the BUEA's social and physical environment through accessibility modifications. This grant intends to help business owners complete ADA modifications who do not currently meet the requirements due to grandfathered plans. Businesses can use the funding to update their ADA-accessible areas, signage, low shelves, restroom accessibility, & parking space.

III. Proposed Amount

- A. \$15,000 of 150k
 1. Three grants with a max of \$5,000

IV. Intended outcome

- A. To create a more accessible BUEA for people with disabilities, so they can better enjoy Bloomington amenities and better meet their needs.

V. Proposed Guidelines

- A. Application Requirements
 1. Applicants must fill out the BUEA Business Owners Accessibility Modifications Grant application and provide pictures of the area they intend to modify.
 2. Applicants must attach proof of business ownership address, such as a utility bill, lease agreement, or deed.
 3. Applicants must briefly describe their accessibility modification project and the contractor's receipt or invoice.
 4. Eligible projects include improving accessible areas and signage, low shelves, restroom accessibility, & parking space.
 5. BUEA will cover 75% of the project cost with a ceiling of \$5,000 for a pre-approved accessibility modifications project.
 6. Work on the property cannot start before application approval
 7. A cost estimate and a "before" photo accompany the application and include plans and all other pertinent information regarding this project. Assessments must consist of materials/product list breakdowns.
 8. BUEA will rebate the property owner after work is complete. The applicant provides a final bill, copies of canceled checks for the applicant's half, and an "after" photo of the completed work.

6. BUEA Resident Child Care Grant

FIRST DRAFT

Accessibility

I. Purpose

- A. To improve the economic environment of the BUEA. According to a study conducted by the Fall 22 Capstone at the O'Neil School of Public Affairs, 54.29% of people aged 25-34 feel burdened by childcare costs in Bloomington. This grant aims to provide financial assistance to parents in the BUEA who cannot afford the high cost of child care, pre-k education, and after-school activities for their children.

II. Proposed Amount

- A. \$30,000 out of \$150,000 unbudgeted grants
 1. Six grants with a max amount of \$5,000 each

III. Intended outcome

- A. Affordable and consistent childcare promotes parental employment, financial stability, and child learning. Therefore, the BUEA intends to increase the BUEA's workforce by creating options for parents who may need support in balancing work-life responsibilities and improving the quality of life for BUEA residents, ultimately improving the overall economic vitality of the EZ.

IV. Proposed Guidelines

A. Application Requirements

1. *To be eligible for this grant applicant must make \$35,000 or less annually or \$17.00 or less an hour
2. Applicant must fill out BUEA Resident Child Care Grant on Survey Apply.
3. Applicants must attach proof of address such as a utility bill, current lease, deed, mortgage payment, or W-2.
4. Applicants must submit evidence of childcare, preschool education, or afterschool program enrollment documentation and invoice.
5. Childcare providers may use this grant to cover the costs of materials needed by facilities to provide childcare services.
6. Eligible programs include: certified/accredited childcare providers and preschool education, as well as afterschool programs provided by MCCSC, The Boys and Girls Club, and YMCA.
7. This grant may cover materials needed for the materials mentioned above, such as uniforms, art supplies, and sports equipment.
8. BUEA will pay the childcare provider directly.

*Justification

- To be eligible for this grant applicant must make less than \$35,000 of yearly income or \$17.00 an hour.
 - According to the Census, the median gross rent from 2017-2021 was \$988. However, the median household income was \$41,354, and 33.% of Bloomington's population lives in poverty.
 - According to MIT's Living Wage Calculator, a family in Indiana with two working adults and two children must make at least \$21.01 each.