



City of Bloomington Common Council

Legislative Packet

Containing legislation and materials related to:

Wednesday, 16 February 2022

Regular Session

Starting at 6:30 pm

**Please see the notes on the [Agenda](#) addressing public meetings during the public health emergency. For a schedule of upcoming meetings of the Council and the City's boards and commissions, please consult the City's [Calendar](#).*



CITY OF BLOOMINGTON COMMON COUNCIL

AGENDA AND NOTICE:
REGULAR SESSION
WEDNESDAY | 6:30 PM
16 FEBRUARY 2022

*Per IC 5-14-1.5-3.7, this meeting will be conducted electronically.
The public may access the meeting at the following link:*

<https://bloomington.zoom.us/j/86369989231?pwd=TUVEEd2JBU2hjNFI6Y3cwaHJ6Vm52Zz09>

- I. **ROLL CALL**
- II. **AGENDA SUMMATION**
- III. **APPROVAL OF MINUTES** - *None*
- IV. **REPORTS** (*A maximum of twenty minutes is set aside for each part of this section.*)
 - A. **Councilmembers**
 - B. **The Mayor and City Offices**
 - C. **Council Committees**
 - a. Council Transportation Committee Report – 2022 Council Sidewalk Funding
 - D. **Public***
- V. **APPOINTMENTS TO BOARDS AND COMMISSIONS**
- VI. **LEGISLATION FOR SECOND READINGS AND RESOLUTIONS**
 - A. **Resolution 22-05** - To Designate an Economic Revitalization Area, Approve the Statement of Benefits, and Authorize an Abatement Period for Real Property Improvements and Personal Property Re: Properties at 1300 S. Patterson Drive (Catalent Indiana, LLC, Petitioner)
- VII. **LEGISLATION FOR FIRST READINGS**

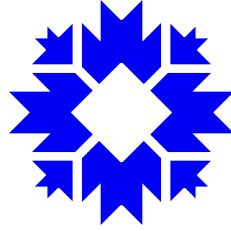
None
- VIII. **ADDITIONAL PUBLIC COMMENT*** (*A maximum of twenty-five minutes is set aside for this section.*)
- IX. **COUNCIL SCHEDULE**
- X. **ADJOURNMENT**

* Members of the public may speak on matters of community concern not listed on the agenda at one of the two public comment opportunities. Citizens may speak at one of these periods, but not both. Speakers are allowed five minutes; this time allotment may be reduced by the presiding officer if numerous people wish to speak.

STATEMENT ON PUBLIC MEETINGS DURING THE PUBLIC HEALTH EMERGENCY

Under Indiana Code 5-14-1.5-3.7, during a declared public health emergency, the Council and its committees may meet by electronic means. The public may simultaneously attend and observe this meeting at the link provided above. Please check [the Council Website at https://bloomington.in.gov/council](https://bloomington.in.gov/council) for the most up-to-date information on how the public can access Council meetings during the public health emergency.

Posted: 11 February 2022



**City of Bloomington
Office of the Common Council**

NOTICE

Wednesday, 16 February 2022

**Regular Session
Starting at 6:30 pm**

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<https://bloomington.zoom.us/j/86369989231?pwd=TUVEd2JBU2hjNFY3cwaHJ6Vm52Zz09>

As a quorum of the Council or its committees may be present, this gathering constitutes a meeting under the Indiana Open Door Law (I.C. § 5-14-1.5). For that reason, this statement provides notice that this meeting will occur and is open for the public to attend, observe, and record what transpires.

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Council Transportation Committee Report – 2022 Council Sidewalk Funding

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- **Signature Sheet**
- **Report of the Common Council Transportation Committee**
- **Common Council Transportation Committee Sidewalk Allocation Recommendations for 2022**
- **Maps for Recommended Projects**
- **Common Council Transportation Committee/Sidewalk Committee Criteria, History, and Other Policies for Sidewalk Allocation**
- **2022 Sidewalk Evaluation Matrix**
- **History of Common Council Transportation Committee / Sidewalk Committee Sidewalk Funds 2002-2021**

Note: The Report can be found [XX \(include hyperlink\)](#) once approved by the Committee

**Signatures for Transportation Committee Report - 2022 Council
Sidewalk Funding (February 16, 2022)**

Note: Your signature below indicates approval of the Report pursuant to BMC 2.04.230 Standing committees-Reports (a), which requires that reports be in writing and be signed by a majority of the membership.

Ron Smith (Chair), District III

Dave Rollo, District IV

Kate Rosenbarger, District I

Steve Volan, District VI

Report of the Common Council Transportation Committee - 2022 Council Sidewalk Funding (February 16, 2022)

Committee Members and Staff

The members of the Committee were appointed by the President of the Council and included:

- Ron Smith, District III (Chair)
- Kate Rosenbarger, District I
- Dave Rollo, District IV
- Steve Volan, District VI

The committee members were assisted by the following persons and departments:

Planning and Transportation (P & T)

Scott Robinson, Director

Beth Rosenbarger, Planning Services Manager

Mallory Rickbeil, Bicycle and Pedestrian Coordinator

Amir Farshchi, Long Range Planner

Engineering (formerly part of P & T)

Andrew Cibor, Director

Neil Kopper, Sr. Project Engineer

Roy Aten, Senior Project Manager

Patrick Dierkes, Project Engineer

Utilities

Brad Schroeder, Assistant Director-Engineering

Jane Fleig, Utilities Engineer

Housing and Neighborhood Development

John Zody, Director

Matt Swinney, Program Manager, Housing and Construction Projects

Parks and Recreation

Steve Cotter, Natural Resources Manager

Office of the City Clerk

Nicole Bolden, City Clerk

Sofia McDowell, Chief Deputy Clerk

Council Office

Stephen Lucas, Council Administrator/Attorney

Heather Lacy, Deputy Administrator/Deputy Attorney

Becky Boustani, Assistant Administrator/Legal Research Specialist

Highlight of Recommendations

This Report of the Transportation Committee (the Committee) outlines the Committee's recommendation to the Council on the use of \$336,000 of Alternative Transportation Fund (ATF) monies budgeted for 2022 for sidewalk and traffic-calming/pedestrian improvements projects. The Committee met December 9, 2021 and January 6, 2022 to review ongoing projects and allocations, discuss program criteria, consider new projects, and make recommendations regarding the allocation of these funds. As in the past, additional funds from various other sources – e.g. P & T (through ATF and other funds), HAND (through CDBG funding), and CBU (City of Bloomington Utilities - for storm water) may be necessary for some projects to move forward or be completed.

In brief, the Committee learned about or recommended funding for the following sidewalk and traffic-calming projects:

Update on 2021 Allocation:

Project	Allocation	Spent/Estimate	Difference	Description
Dunn Street Sidewalk	\$41,000.00	\$40,085	-\$915	Design and right of way services
S. Walnut Street	\$210,000.00	\$0*	-\$210,000	Construction
Adams Street Sidewalk	\$66,000.00	\$25,872.75	-\$40,127.25	Remainder of design and right of way services
Resident Led Traffic Calming	\$13,000.00	\$13,000	\$0	Construction
TOTAL	\$330,000.00	\$78,957.75	-\$251,042.25	

*The bids for the South Walnut Street project came in very high and would have required spending the entire 2022 allocation in addition to the sum that was set aside in 2021. Based on these factors it was decided that the South Walnut Street project was too large for the Committee to fund.

2022 Allocation:

Project	Total Project Cost	Amount Previously Allocated by Committee	2022 Allocation	Description
Adams (Kirkwood to Fountain)	\$323,955.00	\$63,955.00	\$120,000.00	Fund right of way and construction (assuming CDBG award)
Dunn (15 th to 16 th)	\$150,085.00	\$40,085.00	\$110,000.00	Fund construction
S. Overhill Drive (3 rd to 5 th)	\$170,000.00	\$0	\$20,000.00	Fund design
Liberty (3 rd to 360' South)	\$65,000.00	\$0	\$15,000.00	Fund design
Smith (College to Walnut)	\$325,000	\$0	\$21,000.00	Fund conceptual design. There are a number of unknowns with this project.
Traffic Calming and Greenways Projects	\$50,000.00	\$0	\$50,000.00	Fund construction
TOTAL	\$1,084,040.00	\$104,040.00	\$336,000.00	

Schedule

The Committee met electronically via Zoom on:

- Thursday, December 9, 2021 at noon
- Thursday, January 6, 2022 at noon

Deliberation Materials and Minutes Available Online

Deliberation materials and meeting memoranda for the Transportation Committee's meetings are available online at <https://bloomington.in.gov/council/transportation> under Meetings and Documents.

Preliminary Matters

Early on, the Committee:

- Acknowledged and thanked the staff in the Office of City Clerk for serving as Secretary for the proceedings; and
- Accepted the new criteria for prioritizing projects presented by the Planning and Transportation Department.

Purpose of Committee and History of Funding

In the past, the Sidewalk Committee has made recommendations on use of a portion of the Alternative Transportation Fund (ATF) monies appropriated for this purpose and, in the course of doing so, works in concert with City staff to identify funding priorities for sidewalk and traffic calming projects in the City. The ATF was established in 1992 with surplus revenues from the Neighborhood Parking Program and was dedicated to "reducing the community's dependence upon the automobile." (BMC 15.37.160). Over the years, the ATF has also received annual infusions from other City sources. This year, \$336,000 has been appropriated for use by the Committee, which is an increase of \$6,000 over last year.

The table on the following pages provides a rough historical view of funding for Committee projects which is divided into annual Council Sidewalk Budgets, contributions from CBU, and contributions from other sources. Please know that the maintenance of sidewalks is the responsibility of the property owner and that the construction of new sidewalks in the City is mostly done by the owner when property is developed or redeveloped.

Council Sidewalk Committee Projects – Funding Sources

Year(s)	Council Sidewalk Budget		Estimate of Other Contributions	
	Per Year	Total	Other	CBU
2007	\$185,000	\$185,000	\$0	~ \$46,174
2008-2012	\$225,000	\$1,125,000	~\$1,425,000	~\$538,742
2013	\$275,000	\$275,000	~\$1,200,000	\$0
2014-2016	\$300,000	\$900,000	~\$43,000	~\$136,697
2017	\$306,000	\$306,000	~\$239,000	\$0
2018	\$312,000	\$312,000	~\$14,000	\$0
2019	\$318,000	\$318,000	~\$173,500	\$45,000
2020	\$324,000	\$324,000	~\$106,000	\$0
2021	\$330,000	\$330,000	~\$0	\$0
2022	\$336,000	\$336,000	~\$140,000	\$0
Total		\$4,075,000	~\$3,340,500	~\$766,613

Table Notes

1. The amounts in the “Per Year” and “Total” Council Sidewalk Budget columns are amounts budgeted at the beginning of the year. They include amounts dedicated for traffic calming (which, up until 2017, were typically under \$25,000 per year), but do not account for re-appropriation of unspent reverted funds in subsequent years.
2. The amounts in the “Other” column of the “Estimate of Other Contributions” portion of the table were amounts estimated at the time the Committee Reports were filed and do not account for changes after the actual amount was known. Funding sources include, but are not limited to: Greenways Funds (within the ATF); HAND Community Development Block Grant (CDBG) funds (targeting low-income neighborhoods); Cumulative Capital Development (CCD) fund; bond funds; General Fund appropriations to various departments; Metropolitan Planning Organization (MPO); and INDOT funds (like the former Safe Route to Schools program). This year, it is hoped that the Adams Street sidewalk project will receive CDBG funding to complement the Committee’s allocation of funding for this project.
3. The amounts in “CBU” column of the “Estimate of Other Contributions” portion of the table highlight that because sidewalk projects, and more particularly curbs, channel water, they are part of the City’s storm-water infrastructure. The Committee has, over the years, recognized that the storm-water component of a sidewalk project frequently comprises a significant and sometimes a majority of the project cost. The amounts in this column are either fiscal or in-kind contributions from CBU. They are derived from a detailed accounting provided by Jane Fleig, Utilities Engineer covering the years 2007 to 2015, and from Committee Reports thereafter.
4. In 2013, Committee recommended funding the design for a portion of Rockport Road sidewalk project that was part of a much larger road project.

Review of Previous Allocations

Below is the list of previously-funded projects or phases of projects that were completed in 2021, will be completed in 2022, or were found to be larger in scope than was appropriate for funding with the Council’s allocation of the Alternative Transportation Fund.

Recent Previously-Funded Council Sidewalk Projects – Design or Construction 2021/2022			
Project	Total CTC Funding	Other Funds	Current Phase
<u>Completed in 2021</u>			
W. 14th Street – Madison St to Woodburn Ave	\$77,431.75	\$132,337 (CDBG)	Completed
Maxwell Street – Miller Dr to north of Short Street	\$136,826	\$7,920 (P&T funding)	Completed
Moore's Pike and Smith Rd – curb ramps & crosswalks	\$43,330	--	Completed
South Walnut St – Winslow to Ridgeview	--		The bid on this project came in much higher than anticipated and it was decided that is just too large to be a good project for the Committee to fund.
<u>To be Completed in 2022</u>			
Adams St – Kirkwood to Fountain	See 2022 Recommendations		Right of Way and Construction
Dunn (15th to 16th)	See 2022 Recommendations		Construction

Please note that P & T staff provide an annual Council Sidewalk Project Status Report, (a copy of the Report can be found in the December 9, 2021 Transportation Committee meeting materials [here](#)) that includes a summary of Complementary Initiatives. The Report mentions “projects from the Council Sidewalk Committee’s 2022 project prioritization list [that] have a range of design aspects that are currently either being planned, designed, or constructed outside of the Council Sidewalk Committee initiatives” and may offer opportunities for coordination of funding in the future.

Please note that other sidewalk and pedestrian projects are pursued by various other city departments and funded through various means.

Previous Program Criteria for Sidewalk Projects

For more than 20 years, the Committee used six core criteria to decide upon the funding of sidewalks. The criteria were refined over time, but continued to prioritize the construction (not maintenance) of sidewalks that fill in gaps in the City’s sidewalk network that will be used by, and improve the safety of, pedestrians. The following Evaluation Matrix explains the criteria, analytics and information used in previous funding cycles:

Criteria	Analytics and Information	
1) Safety Considerations	Pedestrian Level of Service (PLOS) - gauges the pedestrian experience based upon traffic volume and speed, lane width, presence and width of sidewalk, and presence, type, and width of the buffer.	
2) Roadway Classification		
3) Pedestrian Usage	Residential Density	Walkscore – an online score that gauges pedestrian demand based upon proximity to a mix of destinations. Score: 0 (car dependent) – 100 (walker’s paradise)
4) Proximity to Destinations	Transit routes and stops	
5) Linkages	Proximity to existing sidewalks as shown on Sidewalk Inventory (updated intermittently).	
6) Cost and Feasibility	Estimates provided by Engineering Dept.	

Prior to this year’s funding cycle, the P & T department prepared a Project Prioritization list which scored projects based upon objective measures associated with some, but not all, of the criteria. However, the Project Prioritization list did not incorporate objective measures for evaluating connectivity or feasibility, which left the satisfaction and weighing of those criteria to the judgment of the Committee members.

During the 2021 funding cycle, the Committee discussed a Sidewalk Equity Audit and associated recommendations prepared by Bicycle and Pedestrian Safety Commission President Mark Stosberg and submitted to the Mayor, City Council, and various city staff members. The full audit is available online [here](#).

In addition to the suggestions contained in this audit, the 2021 Committee members also discussed census block maps that were created by P & T staff and submitted to the Committee for consideration. The 2021 Committee discussed potential revisions to the program criteria and related objective factors, and, while no formal changes were implemented in the 2021 funding cycle, the 2021 Committee indicated it would like P & T staff to consider and recommend what additional or different metrics are available and best suited to objectively measure the criteria the Committee values in new projects.

2022 Program Criteria for Sidewalk Projects

For the 2022 funding cycle, the P & T staff submitted a report to the Committee and subsequently to the full Council, which included revised metrics best suited to objectively guide the Committee’s evaluation of projects. These revised metrics took into consideration the analysis provided in the Sidewalk Equity Audit and include two new mechanisms to inform sidewalk project prioritization: an inventory of missing sidewalks and weighted metrics to identify those areas best-suited for improvement. The Committee voted to revise the criteria in accordance with the recommendations of the P & T Staff at its December 9, 2021 meeting.

In order to prioritize projects objectively, the scope of projects eligible for review was identified by creating a map of all City of Bloomington maintained streets with missing sidewalks. This map was created using data from the 2018 LiDAR scan, and it was updated to include sidewalk projects completed or in design/construction phase in 2019, 2020, and 2021.

Next, weighted metrics were developed to identify those areas from the map of missing sidewalks best-suited for improvement. The data for the development of these weighted metrics was collected from the Census, the City GIS inventory, and formulas that indicate high areas of potential use and connectivity to transit. The following Evaluation Matrix explains the criteria, analytics and information used in this year’s funding cycle:

2022 Sidewalk Evaluation Matrix			
	Criteria	Analytics and Information	Criteria Weight
Demand and Density Data	Walk Potential	Based on 10-minute travel maps between residential areas and destinations (cafes, libraries, banks, grocery stores, hardware stores). The 10-minute walk distance is based on the actual street grid, not how a bird would travel. The more destinations that overlap and that can be reached within a 10-minute walk, the higher the score. This tool replaces the manually-applied walk score data included in years past prioritization methods.	25%
	Population Density	2019 American Community Survey Census Block Group data converted to a weighted score. Higher scores reflect areas with increased population density.	25%
	% Walk to Work	2019 American Community Survey Census Block Group data, converted to a weighted score ranging from 1 to 26. Areas where residents report higher rates of walking to work score higher than areas with less reported rates of walking to work.	7%
	% Transit to Work	2019 American Community Survey Data converted to a weighted score ranging from 1 to 100. Areas where residents report higher rates of utilizing transit to commute to work are higher than areas with less reported rates of utilizing transit to get to work	7%

	Vehicle Count	Derived from the 2019 American Community Survey Data which counts private registered vehicles per household. The variable scores and weigh each Census Block Group to reflect priority for residents in areas where average car ownership rates are lower.	6%
Safety and Harm Reduction Data	Adjacent Street Speed	Scores based on City-maintained Centerline data for speed limits. Streets with higher posted speed limits are weighted for greater point values/priority over streets with lower speed limits.	10%
	Adjacent Street Width	Scores based on City-maintained Centerline data for road width. Wider streets are scored for priority over streets that are narrower. Wider streets are prioritized because generally traffic travels faster on wider streets.	10%
Historically Excluded Groups Data	% Resident Renters	2019 American Community Survey Data which scores Census Block Groups with higher percentages of residents who are renters over areas with fewer renter households.	3%
	% BIPOC Renters	2019 American Community Survey Data which scores Census Block Groups with higher percentages of residents who are Black, Indigenous, and People of Color over Census Block Groups with lower percentages of residents who are Black, Indigenous, and People of Color.	3%
	Median Income	2019 American Community Survey Data, scored such that Census Block Groups with lower reported median income are prioritized over areas with higher median incomes.	4%
	Total		100%

Setting Priorities after Accounting for Shortfalls and Reviewing High-Ranking Projects

Along with reviewing and addressing funding for ongoing projects, the Committee reviewed the comprehensive map of missing sidewalks and the P & T staff’s prioritization of high-ranking projects identified by utilizing the revised sidewalk evaluation metrics. Based on the projects identified by P & T staff and reviewed by the Committee, P & T along with the Engineering department provided or confirmed rough design/right-of-way/construction estimates for those projects identified as high-ranking priorities. At the end of its deliberations, the Committee recommended allocations for: (1) the right-of-way and construction for one previously funded sidewalk project; (2) construction of a previously funded sidewalk project; (3) design of three new sidewalk projects; and (4) two resident-led traffic calming projects prioritized through the Traffic Calming and Greenways Program that was adopted in 2020. Information about the Traffic Calming and Greenways Program and be found [here](#).

Funding Recommendations for 2022

Funding for In-Progress Projects

- **Sidewalk Right of Way and Construction – Adams Street – Kirkwood to Fountain (Rank #1)**

During the 2021 funding cycle, the Committee allocated \$63,955.00 for the remainder of design and right of way services. This year, the Committee recommends allocating \$120,000 to fund the remainder of the right of way services and construction of the sidewalk. It is worth noting that the total cost of the remainder of the right of way services and construction will be split between the funds allocated by the Committee and amounts received from a CDBG grant, if any.

- **Construction – Dunn Street – 15th St to 16th St – West Side (Rank #2)**

During the 2021 funding cycle, the Committee allocated \$41,000 for design and right of way services. This year, the Committee recommends funding the construction of the sidewalk at an estimated cost of \$110,000.

Funding for New Sidewalk Projects

The Committee utilized the revised metrics for the 2022 funding cycle and recommends the following high-ranking projects. Each project is within a 5-minute walk of a transit stop and is located adjacent to high-ranking streets from the Safety and Harm Reduction category of the 2022 Sidewalk Evaluation Matrix.

- **Design – S. Overhill Drive – 3rd St to 5th St (Rank #3)**

The estimated total cost of this project, including construction is \$170,000. The Committee recommends allocating \$20,000 toward this project for design during the 2022 funding cycle.

- **Design – Liberty Drive – 3rd to 360° south (northern entrance of Whitehall Plaza) (Rank #4)**

The estimated total cost of this project, including construction is \$65,000. The Committee recommends allocating \$15,000 toward this project for design during the 2022 funding cycle.

- **Conceptual Design – Smith – College to Walnut (Rank #5)**

The estimated total cost of this project is \$325,000. The Committee recommends allocating \$21,000 toward this project for conceptual design during the 2022 funding cycle. It is worth noting that this project has a number of challenges and unknown variables owing to the narrowness of the street, the location of buildings in proximity to the street, and parking lots along both sides of the street.

Funding for Traffic Calming Projects

In 2020, the City implemented a new Traffic Calming and Greenways Program (TCGP). Information about the TCGP can be found [here](#).

- **Resident-Led Traffic Calming Projects (Rank #6)**

Based on the analysis and recommendation of P & T staff, the Committee recommends allocating \$50,000 toward resident-led traffic calming projects in order to provide funding for construction of the Crestwood Neighborhood traffic calming project that was prioritized in 2021 and a project prioritized in the 2022 funding cycle. The Resident-Led Traffic Calming Program is accepting applications until March 11, 2022. Following the close of the application process, P & T staff will identify and prioritize the project for this funding cycle.

Order of Priorities for Project Funding

As it has done in past years, given the uncertainty surrounding actual costs for design/ROW/construction, the Committee has ranked its recommended projects in order of priority (1 being the highest priority project, 2 being the next highest priority project, etc.). Within the parameters of the Committee's established Overage Policy, this ranking provides guidance to staff on which projects should be fully funded first.

Summary of Actions

In summary, during the course of its deliberations, the Committee:

- Provided an opportunity for Committee members or staff members to disclose any potential conflicts of interest for those who might own or reside in homes along sidewalk projects recommended for funding by the Committee;
- Heard a progress report regarding on-going projects;
- Discussed and received public comment on the Committee's revised prioritization metrics;
- Reviewed the list of projects recommended for funding and provided an opportunity for public comment;
- Recommended the allocation of \$336,000 in ATF monies for the completion of two ongoing sidewalk projects, the design of three new sidewalk projects, and the contribution of funds toward new, resident-led TCGP projects – *See Funding Recommendations (attached)*.
- Approved minutes for the 2021 funding cycle meetings and authorized the Chair to correct and approve the minutes for the 2022 meetings after providing committee members and staff an opportunity to review and comment on them;
- Authorized submittal of a Committee Report to the Council (after signatures have been obtained by a majority of Committee members).

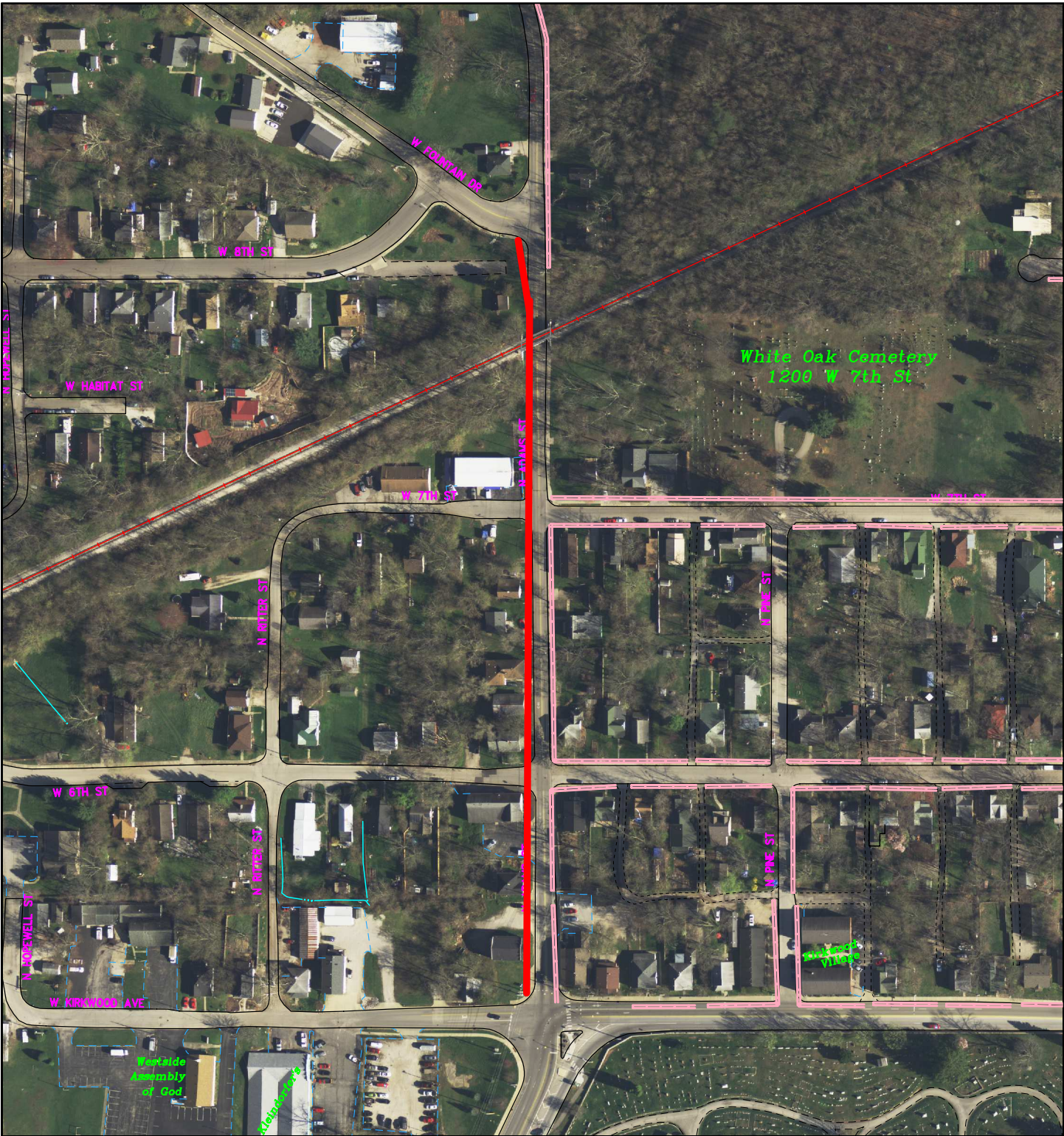
**COMMON COUNCIL TRANSPORTATION COMMITTEE (COMMITTEE) SIDEWALK
ALLOCATION RECOMMENDATIONS FOR 2022
- FUNDS AVAILABLE: \$336,000**

Project	ATF	ATF (Additional Amounts – Should They be Appropriated)	CBU	OTHER FUNDS	Priority
<u>Sidewalk Projects</u>					
Right-of-Way and Construction: Adams St. – from W. Kirkwood Ave. to Fountain Dr.	\$120,000		\$0	\$140,000	1
Estimated Costs					
Design: \$63,955					
Right-of-Way: \$70,000					
Construction: \$190,000					
Previous expenditures for project					
Planning and Engineering: \$63,955					
Construction: Dunn St. – from 15th St. to 16th St.	\$110,000		\$0	\$0	2
Estimated Costs					
Design: \$40,085					
Right-of-Way: \$0					
Construction: \$110,000					
Design: S. Overhill Dr. – from 3rd St. to 5th St.	\$20,000		\$0	\$0	3
Estimated Costs					
Design: \$20,000					
Right-of-Way: \$0					
Construction: \$150,000					
Design: Liberty Dr. – from 3rd St. to 360° south (northern entrance of Whitehall Plaza)	\$15,000		\$0	\$0	4
Estimated Costs					
Design: \$15,000					
Right-of-Way: \$0					
Construction: \$50,000					
Design: Smith Ave. – from College Ave. to Walnut St.	\$21,000		\$0	\$0	5
Estimated Costs					
Design: \$50,000					
Right-of-Way: \$75,000					
Construction: \$200,000					
<u>Traffic Calming</u>					
General Traffic Calming and Greenways Program Resident-led Projects	\$50,000		\$0	\$0	6
Estimated Costs					
\$50,000					
2022 ALLOCATION	\$336,000	\$0	\$0	\$140,000	

**COMMON COUNCIL TRANSPORTATION COMMITTEE (COMMITTEE) SIDEWALK
ALLOCATION RECOMMENDATIONS FOR 2022**

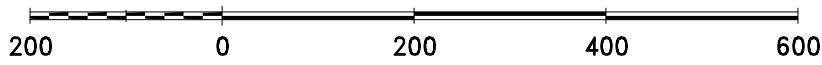
CHART NOTES

1. **Project.** This column identifies the location and details about the project.
2. **Alternative Transportation Fund (ATF).** This column represents ATF funds appropriated in 2022 for sidewalk and traffic-calming initiatives recommended by the Committee.
3. **ATF (Additional Amounts – Should they be Appropriated).** This column is available to capture unused funds from prior years should the Committee wish to make recommendations about the use of the remaining funds and any necessary additional appropriation proposals. No funds were identified for additional appropriation and, therefore the shaded column remains empty.
4. **CBU.** This column represents CBU assistance with the storm-water component of projects. The CBU evaluates the storm-water component of projects and, when able, offers some in-kind contributions when these projects align with CBU storm-water priorities. There were no CBU in-kind contributions identified for sidewalk construction projects recommended by the Committee for 2022.
5. **OTHER FUNDS.** This column represents project funding from other sources. The Adams Street project was recognized as eligible for CDBG funds and an application for CDBG funding was submitted for funding in 2022. The Committee has recommended an allocation of \$120,000 toward the project with the hope that the project will receive at least funding for the remaining \$140,000 through the CDBG process in 2022.
6. **PRIORITY.** This column represents the Committee’s prioritized funding for the projects in order to provide guidance to staff in the event that funding shortages prevented the completion of all recommendations.

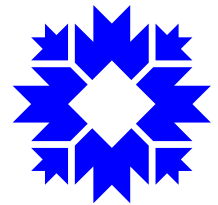


Adams Street - Kirkwood to Fountain

By: lucass
24 Jan 20

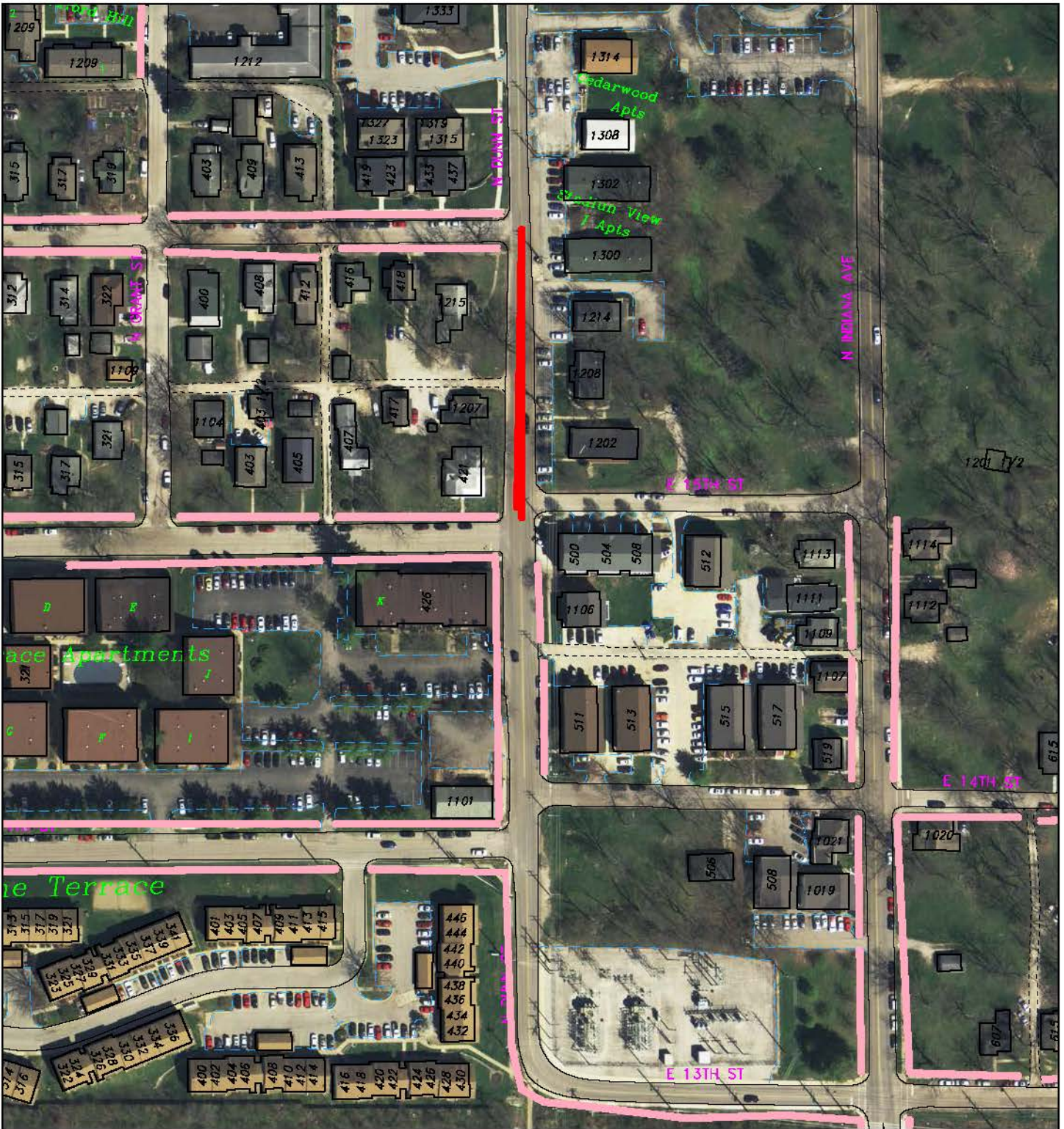


City of Bloomington
Council Office



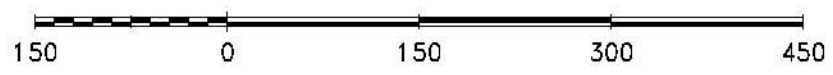
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For reference only; map information NOT warranted.

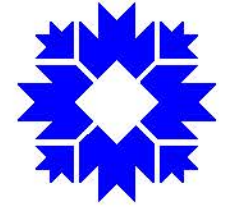


2020 sidewalk request - Dunn St (from 15th St to 16th St)

By: lucass
30 Nov 20

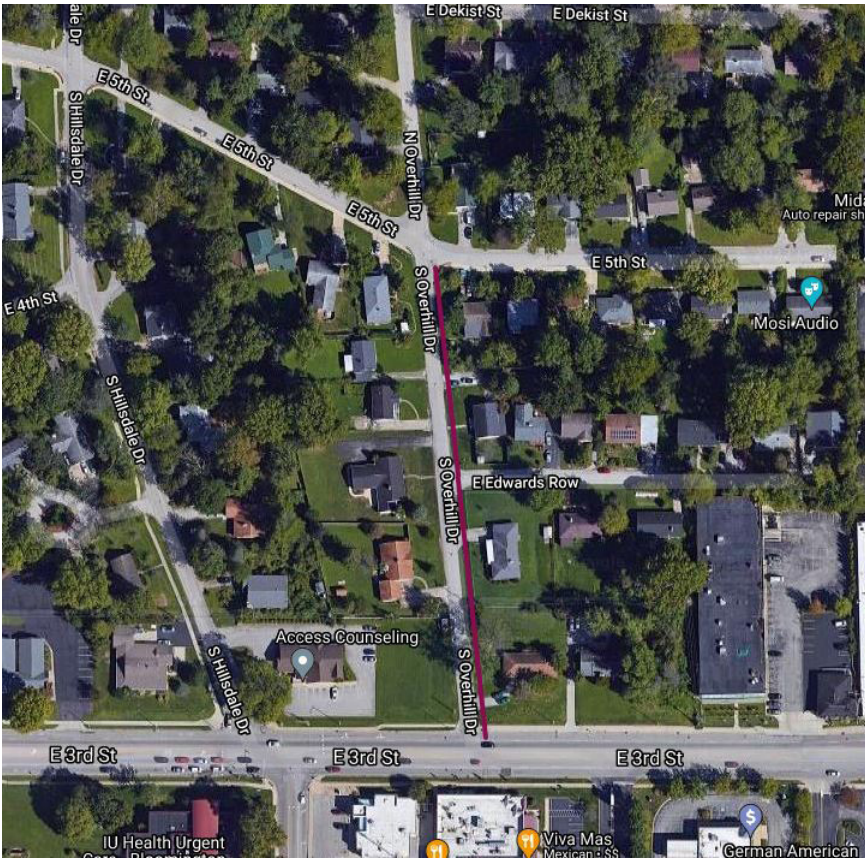


City of Bloomington
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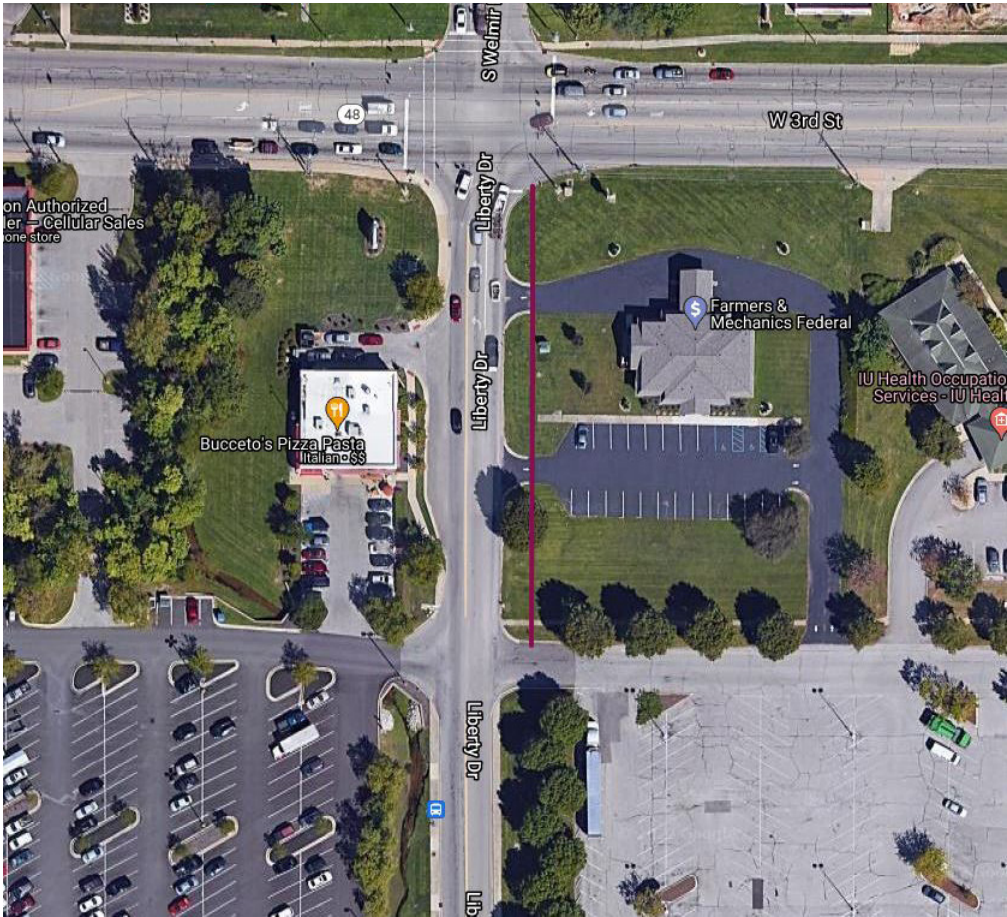


Scale: 1" = 150'

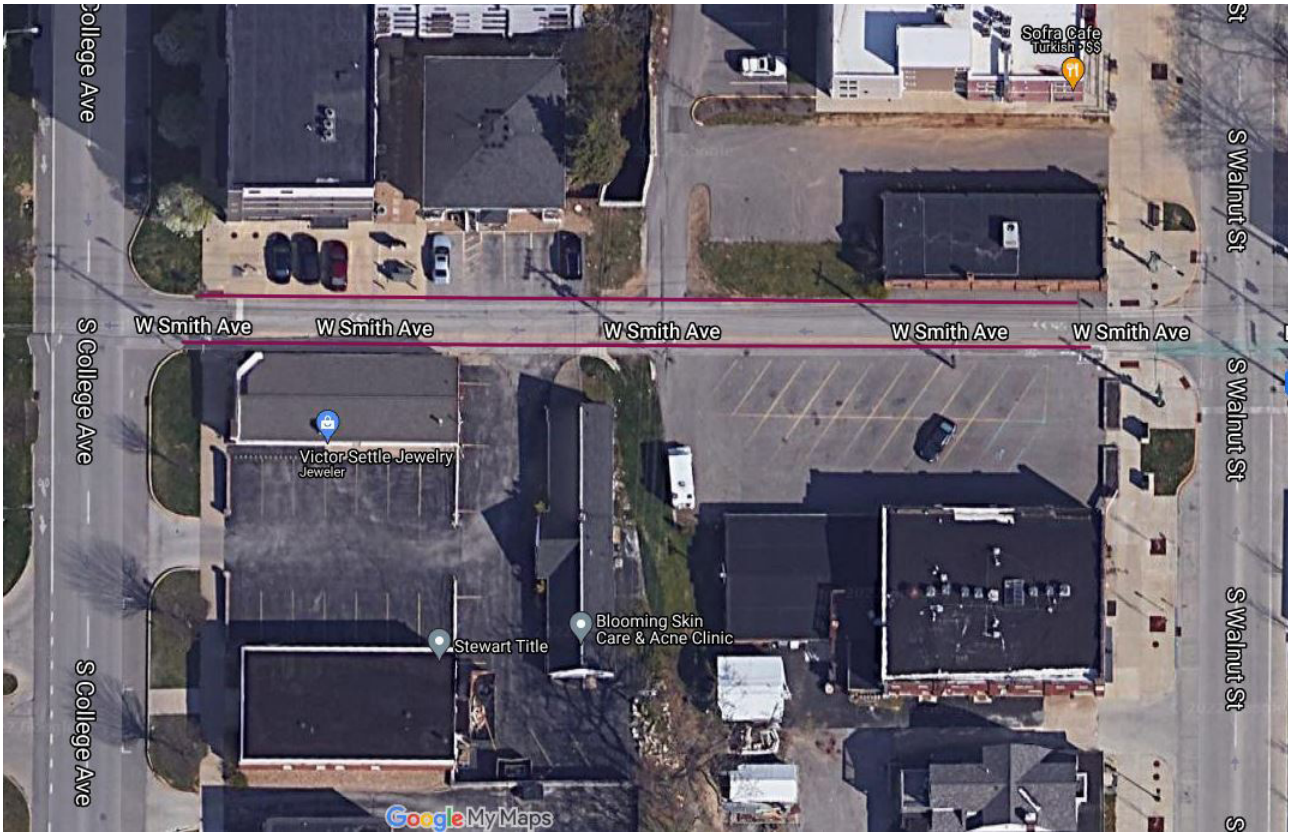
For reference only; map information NOT warranted.



S. Overhill Drive (between E. 3rd Street and E. 5th Street)



Liberty Drive (South of W. 3rd Street intersection)



W. Smith Avenue (Between S. College Ave and S. Walnut Street)

Common Council Transportation Committee/Sidewalk Committee Criteria, History, and Other Policies for Sidewalk Allocation

History of Criteria - The criteria for selecting sidewalk projects first appeared in a memo entitled the *1995 Linkages Plan – Criteria for Project Selection/Prioritization* and have been affirmed and revised over the years. These criteria for consideration initially included the following:

- Safety Consideration – A particular corridor could be made significantly safer by the addition of a sidewalk.
- Roadway Classification – The amount of vehicular traffic will increase the likelihood of pedestrian/automobile conflicts, which a sidewalk could prevent. Therefore, arterial and collector streets should be a priority for linkages over residential/subdivision streets.
- Pedestrian Usage – Cost-effectiveness should be based on existing and projected usage.
- Proximity to Destination Points – Prioritization of linkages should be based on proximity to destination such as elementary school, Indiana University, employment centers, shopping opportunities, parks/playgrounds, etc.
- Linkages – Projects should entail the construction of new sidewalks that connect with existing pedestrian facilities.
- Costs/Feasibility – Availability of right-of-way and other construction costs must be evaluated to determine whether linkages are financially feasible.

Over the years the Committee has revised these criteria as follows:

- On October 16, 2006, the Committee added “Indiana University” as another “destination point” under the fourth criteria (Proximity to Destination Points). At that time, it decided not to explicitly recognize “synergy” as another criteria, because it was already being considered as a factor under the fifth criteria (Costs/Feasibility).
- On January 4, 2008, the Committee added the fifth criteria defining “Linkages.”
- On November 12, 2009, the Committee revised “Proximity to Destination Points” to clarify that the list was illustrative and included “employment centers” among other destinations.

Current Criteria - On December 9, 2021, the Committee voted to revise the criteria in accordance with the recommendations of the P & T Staff taking into consideration the information gleaned from the Sidewalk Equity Audit and associated recommendations prepared by Bicycle and Pedestrian Safety Commission President Mark Stosberg. The revisions consist of the identification of three broad categories: Demand and Density, Safety and Harm Reduction, and Historically Excluded Groups. Each broad category contains weighted criteria, which will be used to prioritize and select sidewalk projects. The criteria, assigned weight, and analytic information are described on the 2022 Sidewalk Evaluation Matrix in this Report.

Other Policies – Overage Policy – Each year the Committee Report uses estimates submitted by City Engineering to allocate funds between projects. Even with a 10% contingency, these estimates are sometimes far-off the bid for, or actual cost of, the project. At its January 6, 2022 meeting, the Committee approved of a motion to allow the allocation scheme to be amended by the Transportation Committee Chairperson in consultation with city staff to fund priorities on the current list of allocations.

2022 Sidewalk Evaluation Matrix			
	Criteria	Analytics and Information	Criteria Weight
Demand and Density Data	Walk Potential	Based on 10-minute travel maps between residential areas and destinations (cafes, libraries, banks, grocery stores, hardware stores). The 10-minute walk distance is based on the actual street grid, not how a bird would travel. The more destinations that overlap and that can be reached within a 10-minute walk, the higher the score. This tool replaces the manually-applied walk score data included in years past prioritization methods.	25%
	Population Density	2019 American Community Survey Census Block Group data converted to a weighted score. Higher scores reflect areas with increased population density.	25%
	% Walk to Work	2019 American Community Survey Census Block Group data, converted to a weighted score ranging from 1 to 26. Areas where residents report higher rates of walking to work score higher than areas with less reported rates of walking to work.	7%
	% Transit to Work	2019 American Community Survey Data converted to a weighted score ranging from 1 to 100. Areas where residents report higher rates of utilizing transit to commute to work are higher than areas with less reported rates of utilizing transit to get to work	7%
	Vehicle Count	Derived from the 2019 American Community Survey Data which counts private registered vehicles per household. The variable scores and weigh each Census Block Group to reflect priority for residents in areas where average car ownership rates are lower.	6%
Safety and Harm Reduction Data	Adjacent Street Speed	Scores based on City-maintained Centerline data for speed limits. Streets with higher posted speed limits are weighted for greater point values/priority over streets with lower speed limits.	10%
	Adjacent Street Width	Scores based on City-maintained Centerline data for road width. Wider streets are scored for priority over streets that are narrower. Wider streets are prioritized because generally traffic travels faster on wider streets.	10%
Historically Excluded Groups Data	% Resident Renters	2019 American Community Survey Data which scores Census Block Groups with higher percentages of residents who are renters over areas with fewer renter households.	3%
	% BIPOC Renters	2019 American Community Survey Data which scores Census Block Groups with higher percentages of residents who are Black, Indigenous, and People of Color over Census Block Groups with lower percentages of residents who are Black, Indigenous, and People of Color.	3%
	Median Income	2019 American Community Survey Data, scored such that Census Block Groups with lower reported median income are prioritized over areas with higher median incomes.	4%
	Total		100%

A HISTORY OF COUNCIL SIDEWALK COMMITTEE FUNDS, 2002-2021

2021

Site	Estimate	Recommendation	Possible Additional Appropriation	Comments
Sidewalk - Adams Street - from Kirkwood to Fountain (West Side)	\$323,955.00	\$120,000	\$140,000	This project received \$63,955 in design and right-of-way funding in 2020. The cost estimate for the sidewalk totaled \$323,955 (\$63,955 for design, \$70,000 for right-of-way services and \$190,000 for construction). This project was identified as a good fit for Community Development Block Grant (CDBG) funding. An application was submitted and awarded funding will be known in the coming weeks. It was the Committee's hope that the project would receive a least partial funding from CDBG in order to allow the project to move forward with an allocation of \$120,000 from the Committee.
Sidewalk - Dunn - from 15th to 16th	\$150,085	\$110,000		This project received \$41,000 in design and right-of-way funding in 2020. In April 2021, the City awarded a design contract to engineering firm Bledsoe Riggert Cooper James for \$40,085. Design for this project is ongoing. The cost estimate for this project is \$150,085 (\$40,085 for design and \$110,000 for construction) but these numbers may change based on refinements in the design process.
Sidewalk - S. Overhill Drive - 3rd to 5th	\$170,000	\$20,000		This sidewalk request was identified utilizing the revised metrics for prioritization of sidewalk projects. The project scored high based on the weighted criteria in the revised metrics - it is within a 5-minute walk of a transit stop and is located adjacent to high-ranking streets in the safety/and harm reduction criteria. The total cost of the project is estimated to be \$170,000 (\$20,000 for design, and \$150,000 for construction). The Committee recommends allocating \$20,000 for design to get this project started.
Sidewalk - Liberty Drive - 3rd to 360 degrees south	\$65,000	\$15,000		This sidewalk request was identified utilizing the revised metrics for prioritization of sidewalk projects. The project scored high based on the weighted criteria in the revised metrics - it is within a 5-minute walk of a transit stop and is located adjacent to high-ranking streets in the safety/harm reduction criteria. The total cost of this project is estimated to be \$65,000 (\$15,000 for design and \$50,000 for construction). As with all projects, these cost estimates are subject to change as more information becomes available based on design and right-of-way acquisition refinements. The Committee recommends allocating \$15,000 to begin the design process on this project.
Smith - College to Walnut	\$325,000	\$21,000		This sidewalk request was identified utilizing the revised metrics for prioritization of sidewalk projects. The project scored high based on the weighted criteria in the revised metrics - it is within a 5-minute walk of a transit stop and is located adjacent to high-ranking streets in the safety/harm reduction criteria. However, this project has a number of unknowns at this time owing to the proximity of the buildings and parking lots on either side of the street. The Committee recommends allocating \$21,000 to the conceptual design process in order to assess the feasibility of this project.

Resident-led traffic calming	\$50,000	\$50,000		The Committee recommends allocating \$50,000 to resident-led traffic calming projects. This recommendation was based on P & T staff's recommendation and would provide funding for the resident-led traffic calming project that was prioritized in 2021 and a project that is prioritized during the 2022 funding cycle. The resident-led traffic calming program is currently accepting applications. The application process will close March 11, 2022.
Total	\$1,084,040	\$336,000	\$140,000	The Committee should learn status of the CDBG funding allocations in the coming weeks. The project rankings may be utilized to provide guidance for staff in the event that the CDBG funding allocation is less than needed to complete the Adams Street sidewalk project.

2020

Site	Estimate	Recommendation	Possible Additional Appropriation	Comments
Sidewalk - S. Maxwell Street - from E. Miller Dr. to north of Short Street (West Side)	\$123,000.00	\$123,000.00		This project received \$13,000 in design funding in 2018. At that time, a Planned Unit Development for a co-housing project in the area raised concerns about increased vehicular traffic. The Committee believed a sidewalk on the west side of Maxwell Street might help mitigate any adverse impacts. The cost estimate for the sidewalk totaled \$123,000 (\$8,000 for right of way services and acquisition and \$115,000 for construction).
Sidewalk - 14th Street - from Madison to Woodburn (North Side)	\$156,000.00	\$50,000.00	\$106,000.00	This one-block sidewalk project is ranked #4 on the Committee's Evaluation Sheet. It would provide a missing link in sidewalks which currently connect with South College to the east and North Madison on the west. HAND staff indicated that the project might be a good fit for Community Development Block Grant (CDBG) funding, and an application for funding was submitted in 2019. Awarded funding from CDBG will not be known until Feb 2020. It was the Committee's hope that the project would received at least partial funding from CDBG that would allow the project to move forward with an allocation of \$50,000 from the Sidewalk Committee (with a total estimated construction cost of \$156,000).
Sidewalk - Walnut Street - from Winslow to Ridgeview (East Side)	\$239,000.00	\$32,000.00		This sidewalk request was new to the Committee in 2020. A resident submitted a request for a sidewalk along the east side of the street, given the difficulty in crossing a busy road to get to the sidewalk on the west side of the street. Staff also identified this project as worthy of consideration for funding. The project was estimated to cost approximately \$239,000 (Design: \$32,000, Right-of-way: \$0; Construction: \$207,000).

Sidewalk - Adams Street - from Kirkwood to Fountain (West Side)	\$240,000.00	\$31,000.00		This sidewalk request was also new to the Committee in 2020. Staff identified this project as one they would prioritize, though staff also cautioned the committee against expanding the scope of the project farther north, which could complicate the project given the nearby railroad crossing. The project was estimated to cost approximately \$240,000 (Design: \$45,000; Right-of-way: \$49,000; and Construction: \$146,000). The Committee's recommendation of \$31,000 was meant to provide staff with enough funding to begin design work on the project.
Traffic Calming -Graham Drive/Broadview Neighborhood	\$60,000.00	\$60,000.00		This allocation follows from previous committee allocations for temporary traffic-calming devices used in the Broadview Neighborhood. Assuming nearby residents support installation of permanent traffic calming devices, this allocation provides funding to install such devices.
Traffic Calming/Pedestrian Crosswalk improvements - Intersection of E. Moores Pike/Smith Road	\$28,000.00	\$28,000.00		This intersection was brought to the Committee's attention by Committee member Rollo, who pointed out that the sidewalk on Moores Pike west of Smith Rd (north side) does not align with the sidewalk east of Smith Rd. (south side). He suggested a crosswalk with signage or other improvements to permit safe crossing for pedestrians to cross at that intersection to continue on the existing sidewalks. This allocation is intended to accomplish this purpose. Staff estimated that design for the project would cost \$8,000 and construction would cost \$20,000.
Total	\$846,000.00	\$324,000.00	\$106,000.00	The Committee should learn the CDBG funding allocations in February 2020. The Committee also indicated its order of priorities for the 2020 projects to provide guidance to staff in the event CDBG funding comes back lower than needed to complete the 14th Street project.

2019				
Site	Estimate	Recommendation	Possible Additional Appropriation	Comments
Sidewalk - 14th Street - from Madison to Woodburn (North Side)	\$186,000.00	\$30,000.00	\$156,000.00	This one-block sidewalk project is ranked #4 on the Committee's Evaluation Sheet. It would provide a missing link in sidewalks which currently connect with South College to the east and North Madison on the west. Staff noted that there would be stormwater issues on the north and an impact on parking and properties on the south. HAND staff indicated that the project might be a good fit for Community Development Block Grant (CDBG) funding. At suggestion of staff, the Committee agreed to recommend \$30,000 to fund design this year, with the prospect of CDBG funding construction in 2020. The estimated cost of construction is \$156,000.
Sidewalk - Moores Pike - from College Mall Road to Woodruff (South Side)	\$136,880.00	\$195,000.00	\$0.00	Moores Pike east of College Mall Road is a busy road with neighborhoods to the south without a sidewalk to the intersection with College Mall Road. In 2009, the Committee funded a sidewalk from Andrews Circle to an existing sidewalk to the east, but was stymied by the estimated cost for widening the roadway at its approach to the intersection. In 2017, the Committee requested new estimates which, with use of the existing roadway, brought down the costs. After allocating \$41,880 for design in 2016, the Committee allocated \$195,000 in 2019 for construction.
Sidewalk - Mitchell Street – from Maxwell Lane to Circle Drive (East Side)	\$285,503.00	\$73,200.00	\$45,000.00	The bids for construction of this project were higher than expected (see 2018) and the Committee recommended allocation of an additional \$73,200 (over the \$136,808 previously allocated for this project) toward this project in 2019, with P & T funding the shortfalls in the other projects. It is anticipated that construction will be completed in 2019. Note that CBU has agreed to contribute \$45,000 toward the stormwater component of this project. Based upon work done so far, the phases/components of the project, have or will cost as follows: Design (\$35,828), Right-of-Way (\$0), Sidewalk Construction (\$249,675), and stormwater improvements (\$45,000 – via CBU).
Traffic Calming - W. Allen Street - from Patterson Drive to Adams Street	\$35,000.00	\$17,500.00	\$17,500.00	This segment of W. Allen came forward as a request for a sidewalk in 2018. P&T staff studied the area and observed high speeds, poor visibility in certain areas, and transit stops. The traffic calming should make crossing the street safer for transit users and would likely take the form of speed humps. Staff assured the Committee that public outreach would be part of this project. After hearing from P&T staff, the Committee agreed to allocate \$17,500 to join the \$17,500 to be contributed by P & T.
Crosswalk - Intersection of S. Mitchell Street and E. Maxwell Lane	\$2,300.00	\$2,300.00	\$0.00	In the past, and in conjunction with its discussion of pedestrian facilities on S. Mitchell Street south of E. Maxwell Lane, the Committee has explored the installation of a crosswalk at this intersection. The rise of the hill and intersection with Jordan Avenue and Maxwell Lane to the west create potential vehicular/pedestrian conflicts at this intersection. For this reason, the Committee allocated \$2,300 for a crosswalk at this location.
Total	\$931,186.00	\$318,000.00	\$173,500.00	

2018				
Site	Estimate	Recommendation	Possible Additional Appropriation	Comments
Moores Pike and Clarizz Boulevard - Pedestrian Crossing	\$95,000.00	\$81,000.00		In 2016, when discussing the request for sidewalk on the south side of Moores Pike at the intersection of College Mall Road, the Committee also looked further east to Clarizz Boulevard and beyond, where there are sidewalks on the north but none on the south. The Committee thought a pedestrian crossing at Clarizz Boulevard would provide some connectivity, but the costs would only be known after an evaluation of what might be done at that intersection. That evaluation was completed in 2017 and proposed the removal of a left-turn lane for eastbound traffic and a possible rectangular rapid flashing beacon, if needed, after experience with usage of the crossing. Costs for the project are expected to include: Evaluation (\$10,710), Engineering (\$20,000), Possible Temporary Right-of-Way (\$ unknown), and Construction (\$75,000). After learning that P & T would contribute up to \$14,000 toward the project, the Committee recommended funding \$81,000 of the \$95,000 needed to complete the project this year.
Walnut Street - Winston/Thomas to National Guard Armory - Sidewalk (West Side)	\$63,000.00	\$63,000.00		In 2003, the Committee began funding missing sidewalks on the west side of South Walnut between Country Club and Rhorer roads, where commercial centers with grocery stores are located at each intersection. It started on the north end, progressed as far as Pinewood, and the Committee has continued to discuss filling in the gaps to the south. In 2016, the Committee reviewed those gaps in sidewalks and sought an estimate for this segment. Total cost of the project would be about \$95,750 – Design (\$32,750), Right-of-Way (\$0) and, Construction (\$63,000). The Committee recommended funding construction this year (\$63,000).
Mitchell Street - Maxwell Lane to Circle Drive - Sidewalk (East Side)	\$198,000.00	\$153,000.00		This sidewalk would serve pedestrians who, due to previous Committee recommendations, have sidewalks on the south at Circle Drive and sidewalks on the north along Maxwell Lane. In 2012, with a modest investment of ~\$1,100, the Committee was able to fund lane-markings for that block (after the Council restricted parking on the east side of the street). In 2016, the Committee recommended funding the design for this project which will be completed in 2018. Based upon work done so far, the phases/components of the project, have or will cost as follows: Design (\$27,250), Right-of-Way (\$0), Sidewalk Construction (\$153,000), and Storm Water Improvements (\$45,000). After learning that CBU would be willing to pay for the storm water improvements, the Committee recommended funding \$153,000 for construction of the sidewalk.
Maxwell Street- Miller Drive to Short Street (West Side)	To be Determined	\$13,000.00		This project was suggested to the Committee by Cm. Rollo after the other new requests had been compiled and ordered on the Evaluation Sheet. It addressed a Planned Unit Development for a Co-Housing project at the corner of Short Street and South Maxwell Street. He heard concerns from residents about the additional vehicular traffic that they anticipate with the additional units and the proposed connection of Short Street to Highland Avenue. A sidewalk along the west side of South Maxwell from Miller Drive would help mitigate the problem. The Committee discussed whether splitting the project into a northern portion to be paid by the City and a southern portion to be paid by the developer might bring about these changes quickly and at a lower cost to the City. To start the process, the Committee recommended allocating \$13,000 toward design of the northern portion of this sidewalk.

Traffic-Calming	\$50,000.00	\$2,000.00		Rather than fund a particular traffic-calming project, the Committee recommended funding \$2,000 toward the acquisition of temporary traffic-calming (speed slowing) devices.
Total	\$406,000.00	\$312,000.00		

2017

Site	Estimate	Recommendation	Possible Additional Appropriation	Comments
E. 10th from Smith Road to Deckard /Tamarron Drive (South Side) - Sidewalk, Pedestrian Crossing, and Other Safety Improvements	\$274,650.00	\$58,000.00		In 2016, after previous interest and investment in the proximate area, the Committee recommended allocating \$50,000 for the design of the sidewalk from Smith Road to the Deckard / Tamarron Drive intersection and a crossing of 10th at that intersection. The design, which cost \$24,460, entailed a meeting with residents and others, and led to a proposal that includes a 10' wide sidewalk from Deckard to Tamarron and a crossing at Tamarron. The crossing should include a median island, school zone, pedestrian hybrid beacon, pavement markings, and advance signage. In 2017, the Committee recommends funding \$58,000 and staff is proposing to add another \$177,000 from other City funds. In addition, staff is working with MCCSC for contributions toward a school zone beacon (~\$15,000) and with INDOT for contributions towards a pedestrian HAWK signal (\$131,000). The City should complete its portion of this project in the summer or fall of 2017 and INDOT should complete its HAWK signal in the summer of 2018.
Rockport Road from Graham Drive to south of West Pinehurst Drive (West Side) - Sidewalk	\$224,460.00	\$200,000.00		Last year, the Committee recommended allocating \$22,000 for the design of this sidewalk project along Rockport Road. Once this sidewalk and sidewalks associated with the intersection improvement at Rockport Road and Tapp Road are completed, the entire boundary of the triangular Broadview Neighborhood will have had pedestrian facilities installed since its phased annexation spanning the late 1990's and early 2000s. This year, the Committee recommends funding \$200,000 for the construction of the second-to-last leg of this long-term pedestrian plan.
Sare Road at Buttonwood Lane and at Spicewood Lane -Traffic calming / Pedestrian Crossing	\$95,000.00	\$48,000.00		This pair of crossings was proposed by Cm. Rollo and was supported by a representative of the Spicewood neighborhood, who addressed the Committee. The crossings would complement a multiuse path from the Renwick development to Buttonwood Drive that the City has proposed for Metropolitan Planning Organization (MPO) funding. Together, these projects would provide a bicycle and pedestrian connection to similar facilities both north and south of this section of Sare Road. The Committee recommends allocation of \$48,000 for these crossings and P & T staff offered an additional \$47,000 needed to design and install these projects. The high cost for this pair of crossings and the discussion of other possible traffic-calming projects led the Committee to adopt a motion to separate consideration of traffic-calming from sidewalk projects in the future.
Total	\$594,110.00	\$306,000.00		

2016

Site	Estimate	Recommendation	Possible Additional Appropriation	Comments
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SR 45/46 Bypass and Tunnel to 7th Street (West Side) - Sidewalk	\$65,000.00	\$20,000.00		This project would connect the sidepath on the west side of the SR 45/46 Bypass and the bicycle/pedestrian tunnel at this site with 7th Street and, thereby, to the neighborhoods to the south and west. It would include installing a ramp from the Bypass to the tunnel and stairs to 7th Street. The cost has grown as the project moved from an in-house to a contracted one. Design was paid for previously. A contingent allocation last year was left unspent because other funds were not available. This year the P & T department has made \$35,000 available and the Sidewalk Committee recommends allocating the remaining \$20,000 to complete this project in 2016.
E. 10th from Smith Road to Tamarron Drive (South Side) - Sidewalk, Pedestrian Crossing, and Other Safety Improvements	\$249,000.00	\$50,000.00		In 2003 and 2004, the Committee funded a sidewalk east of Grandview to connect with existing sidewalks toward town. Over the years, various requests for pedestrian infrastructure from Grandview Drive to Russell Road have been made. The reasons for funding this project include the need to help children walk safely from neighborhoods south of East 10 th to University Elementary School and possibly help MCCSC reduce transportation costs associated with bussing the children to and from school. Staff has been in contact with Indiana Department of Transportation (INDOT), which has jurisdiction over this portion of the corridor, about use of the right-of-way and other cooperation with this project. The Committee recommends funding \$50,000 for design which would include a crossing of East 10 th . An additional \$12,000 would be needed for right-of-way and \$187,000 for construction to complete this project.
Morningside Drive from Sheffield Drive to Park Ridge Road - Sidewalk	\$110,000.00	\$110,000.00		This project would extend a Committee sidewalk project on Morningside Drive which ended at Sheffield to sidewalks and park on Park Ridge Road. The curve in Morningside raised safety issues for pedestrians who now walk in the road and may entail some storm water infrastructure. The Committee recommended funding design (\$15,000), right-of-way (\$4,000), and construction (\$110,000) this year (or bid this year for construction next year).
Moore's Pike from College Mall Road to Woodruff Lane (South Side) - Sidewalk	\$135,000.00	\$24,000.00		Moore's Pike east of College Mall Road is a busy road with neighborhoods to the south without a sidewalk to the intersection with College Mall Road. In 2009, the Committee funded a sidewalk from Andrews Circle to an existing sidewalk to the east, but was stymied by the estimated cost for widening the roadway for a sidewalk to the intersection with College Mall. This year, the Committee requested new estimates which, with use of the existing roadway, brought down the costs to \$135,000 - \$24,000 for design and \$111,000 for construction. The Committee recommended funding design this year.
Union Street from 4th to 7th Street (East Side) - Sidewalk	\$189,000.00	\$32,000.00		This project was first requested in 2008. Union can be a busy street, at times. There is a sidewalk on the west side from 3rd to 10th and on the east side from 3rd to 4th and from about a half block north of 7th to 10th. Over the years, the Committee has heard that pedestrians walk in the street on the east side. Total cost of this project would be \$189,000 with \$32,000 for design, \$34,000 for acquisition of right-of-way (which may be reduced by owner(s) willing to donate the land), and \$123,000 for construction. The Committee recommended allocation funds for design (\$32,000).

South Walnut Street from Winston Thomas to National Guard Armory (West Side) - Sidewalk	\$87,000.00	\$13,000.00		In 2003, the Committee began funding missing sidewalks on the west side of South Walnut between Country Club and Rhorer roads. It started on the north end and progressed as far as Pinewood, and the Committee has continued to discuss filling in the gaps to the south. This year, the Committee reviewed the missing sidewalk segments and sought an estimate for the Winston Thomas to National Guard Armory piece. Total cost of the project would be about \$123,000 – design (\$12,000), right-of-way (\$1,000) and construction (\$74,000). The Committee recommended funding design and right-of-way this year (\$13,000).
Mitchell Street from Maxwell Lane to Circle Drive (East Side) - Sidewalk	\$112,000.00	\$22,000.00		This sidewalk would serve pedestrians who, due to previous Committee recommendations, have sidewalks on the south at Circle Drive and sidewalks on the north along Maxwell Lane. In 2012, with a modest investment of \$1,100, the Committee was able to fund lane-markings for that block (after the Council restricted parking on the east side of the street). This year the Committee sought estimates for a sidewalk which totaled \$112,000 and recommended funding design (\$22,000). The remainder of the costs would be for construction (\$90,000) (with no funds needed for right-of-way).
Rockport Road from Graham Drive to south of West Pinehurst Drive (West Side) - Side Walk	\$137,000.00	\$22,000.00		For well over a decade, the City has invested in pedestrian infrastructure surrounding the triangular-shaped Broadview area. A ~\$1.2 million road & sidewalk project along Rockport Road near Countryside Lane was completed in 2015 (with a ~\$25,000 investment from the Committee for some preliminary costs). No sidewalks are in place on the west side of the street from Graham Drive to the intersection at Tapp Road. An intersection improvement at Tapp Road, primarily funded through the MPO (with federal money), will bring sidewalks to just south of West Pinehurst. The Committee sought an estimate for the missing segment north to Graham Drive and recommended funding for design. Total costs add up to \$137,000 and include \$22,000 for design, \$29,000 for right-of-way, and \$86,000 for construction.
Traffic calming	\$5,000.00	\$5,000.00		The Committee recommend an allocation of \$5,000 for some possible as yet unidentified traffic-calming projects.
Moore's Pike at Clarizz Boulevard (Pedestrian Crossing)	?	*(\$2000)	\$6,000.00	When discussing the south side of Moore's Pike at the intersection of College Mall Road, the Committee also looked further east to Clarizz Boulevard and beyond, where there are sidewalks on the north but none on the south. The Committee thought a pedestrian crossing at Clarizz Boulevard would provide some connectivity, but the costs would only be known after an investment in design (\$8,000). Given other priorities this year, the Committee recommended funding this project if funds reverted in 2015 could be reappropriated. In that event, the allocation would include \$2,000 from 2016 and \$6,000 for 2015.
College Avenue from 10th to 17th - Road Repaving and Curb and Sidewalk Replacement Project	?		\$12,885.00	In the event of an additional appropriation of unspent funds reverted to the ATF at the end of 2015, the Committee responded to a request from Public Works to help with this road repaving and curb and sidewalk replacement project.
TOTAL	\$1,089,000.00	\$298,000 *	\$18,885.00	Note: Another \$2,000 would be added to the \$298,000 to bring the total to the full budgeted amount of \$300,000 if an additional appropriation of unspent funds in 2015 (see column to the left) was approved and allowed, in part, monies for the Moore's Pike /Clarizz pedestrian crossing.

2015				
Site	Estimate	Recommendation	Additional Appropriation	Comments
Kinser Pike - 17th Street north to Apartments (East Side)	\$198,821.00	\$143,851.00		This highest ranking project has been on the list for over a decade due, in large part, to the cost of the right-of-way (which was estimated, at times, at over half of the total project cost. After obtaining estimates for both sides of the street, the Committee chose the east side, which was less expensive and more likely to be used. This recommendation follows expenditures for design and appraisals in 2014 and commits funds necessary to complete this project in 2015.
West 17th Street -- Four Parcels West of Maple to Madison (South Side)	\$600,000.00	\$70,000.00		* Installation of sidewalks on West 17th Street has been a high priority for the City. Given work on the east and west, the scope of the project now runs from four parcels west of Maple to Madison Street. This year's allocation will pay for acquisition of right-of-way between Maple and Madison and design of the sidewalk for the four parcels west of Maple.
Sheffield - Morningside Drive to Providence (West Side)	\$83,000.00	\$75,000.00		This project would complete missing sidewalk segments along Sheffield that would connect with existing sidewalks along Plymouth on the north and recently-completed Council Sidewalk Committee projects on the south along Morningside Drive. Speed of cars descending the curve to Morningside, in part, made this a priority for the Committee. The design was done last year by contract at a cost of \$8,010. The allocation this year will pay for acquisition of temporary right-of-way (\$20,000) and construction (\$55,000) and, if all goes well, should complete the project this year.
Traffic-Calming (Crosswalk at Maxwell and Mitchell Street)	\$5,000.00	\$5,000.00		The Committee initially set aside \$15,000 for a few possible traffic calming projects this year. These included a component of an old project by Fairview School, a crosswalk at Maxwell Lane and Mitchell Street, and traffic calming along Morningside Drive. Given other higher priorities and the likelihood of expenditures in 2015, the Committee allocated \$5,000 toward the crosswalk at Maxwell Lane and Mitchell Street.
SR 45/46 Bypass and Tunnel to 7th Street (West Side)	\$65,000.00	\$6,149.00	\$43,001.00	This project would connect the side path on the west side of the SR 45/46 Bypass and the bicycle/pedestrian tunnel at this site with 7th Street and, thereby, to the neighborhoods to the south and west. It would include installing a ramp from the Bypass to the tunnel and stairs to 7th Street, and may include landscaping provided through CDBG funds. The cost has grown as the project moved from an in-house to a contracted one. Given other higher priorities, the allocations included about \$6,150 from the \$300,000 ATF Budget and an estimated \$43,000 in inspect 2014 funds that might be additionally appropriated for this purpose. In effort to complete this project, the Committee also requested the Administration explore use of other funds to complete this project. That could include paying for traffic calming and allowing that money to go towards this project.
Total	\$951,821.00	\$300,000.00	\$43,001.00	* An additional appropriation may come forward to make unspent 2014 funds available for use in 2015. The amount is an estimate and may change.

2014				
Site	Estimate	Recommendation	Other Funds	Comments
Kinser Pike - 17th Street north to Apartments (East Side)	\$228,412.80	\$38,068.80		This highest ranking project has been on the list for over a decade due, in large part, to the cost of the right-of-way (which amounts to over half of the total project cost of \$228,412). After obtaining estimates for both sides of the street, the Committee chose the east side, which was less expensive and more-likely-to-be-used. This recommendation commits \$38,068.80 toward the design of this project in 2014 with construction considered a high priority in 2015.
West 17th Street -- Maple to Madison (South Side)	\$276,361.80	\$58,810.30		* Installation of sidewalks on West 17th Street has been a high priority for the City and will see progress to the east and west of this project in the near future. This year, the Committee learned it would cost \$276,361.80 for this project, which would include about 650 feet of sidewalk (with some sidewalk already in place), some steps here and there, and some storm water component (estimated at about \$59,000) that might be covered by City Utilities. The recommendation this year is to allot \$46,060.30 toward the design and \$12,750 toward appraisal work for this project and make construction a high priority next year. *CUB will explore in-kind contributions toward the storm water component of this project.
SR 45/46 Bypass and Tunnel to 7th Street (West Side)	\$20,000.00	\$20,000.00		This project would connect the side path on the west side of the SR 45/46 Bypass and the bicycle/pedestrian tunnel at this site with 7th Street and, thereby, to the neighborhoods to the south and west. It would include installing a ramp from the Bypass and stairs from the tunnel. The cost is estimated at \$20,000 and the stairs would have a "cheek wall" for bicyclists to use for their bikes after dismounting them. The Committee thought this may have the added benefit of encouraging more bicycle and pedestrian traffic between the neighborhoods to the east and the campus to the west.
Leonard Springs -- 300 feet South of Walmart Entrance to Tapp Road	Unknown	\$15,000.00	Unknown	Last year the Committee recommended contributing as much as \$15,000 to this Monroe County project over two years if it was going forward. The logic for contributing is two-fold: first, the roadway is owned by the City (but the adjacent land is within the County) and second, there are some pockets within the City to the south with residents that would use the sidewalk. The project would be about 1,200 feet long and cross 10 parcels of land. <i>It is conditioned on adequate assurances that the project will go forward and the contribution will be spend in 2014.</i>
Sheffield - Morningside Drive to Providence (West Side)	\$63,414.45	\$55,143.00		This project would complete missing sidewalk segments along Sheffield that would connect with existing sidewalks along Plymouth on the north and recently-completed Council Sidewalk Committee projects on the south along Morningside Drive. Speed of cars descending the curve to Morningside, in part, made this a priority for the Committee. The Engineering Department will design the project which reduced the outlay by \$8,271.45.
Maxwell Lane -- Jordan Avenue to Sheridan (North Side)	\$96,279.38	\$96,279.38		This follows on the project in 2013 that brought a sidewalk to the north side of Maxwell from the bottom of the hill at Highland to mid-way up the hill at Jordan. It will continue the project over the crest of the hill to Sheridan. Once this block is done - with the help of previous Committee-recommended projects - there will be a continuous run of sidewalks all the way from High Street on the east to Henderson on the west. Funds for the design of this project were provided in 2006.
Traffic-Calming (Unspecified)		\$15,000.00		The Committee set aside \$15,000 for unspecified traffic-calming projects in the event one is ready for installation this year.
Total	\$621,053.98	\$298,301.48		* Note: This history reflects Annual Committee Reports and not Interim Reports. An Interim Report was approved for both 2013 and 2014 that reallocated these funds.

2013				
Site	Estimate	Recommendation	Other Funds	Comments
West 17th Street -- Madison Street to College Avenue (South Side)	\$268,199.00	\$147,351.16	\$107,199.00	Following an investment in the design of this project in 2011 and an offer from City of Bloomington Utilities to cover the storm water costs associated with it, the Committee recommended funding construction of a sidewalk in 2013. The offer from CBU reduced the allocation for this project from \$268,111 to \$161,000, but with the understanding that some of the estimated \$8,500 in remaining funds for the year might be needed to cover any overage. <i>Note that, on December 18, 2013, the Council amended the recommendations to reflect the lower than expected bid for this project.</i>
Maxwell Lane -- Highland Avenue to Jordan Avenue (North Side)	\$87,000.00	\$95,543.62		This is one block of a two-block project that would be constructed on the north side of the street from the bottom of a hill (at Highland) to the other side of the crest at Sheridan. Once these two blocks are complete - with the help of previous Committee-recommended projects - there will be a continuous run of sidewalks all the way from High Street on the east to Henderson on the west. Funds for the design of this project were provided in 2006. <i>Note that, on December 18, 2013, the Council amended the recommendations to reflect an increase in cost of the project from \$87,000 to \$95,543.62, due to the removal of rock.</i>
Moore's Pike and Olcott Boulevard -- Pedestrian Crossing	\$18,500.00	\$7,959.90		This is a pedestrian crossing with a raised island and lane markings to narrow the roadway. It follows a denial of a stop sign request at the Traffic Commission in January and <i>does not</i> include the installation of a stop sign. The crossing will provide residents in Hyde Park and points south access to a continuous sidewalk that runs along the north side of Moore's Pike from Smith Road to Sare Road and further west. <i>Note that, on December 18, 2013, the Council amended its recommendations to reflect an altered project (now with no island, but with a solar-operated speed indicator) and a drop in cost from \$18,500 to \$7,959.90, largely due to the labor having been provided by the Public Works Department..</i>
Rockport Road -- Countryside Lane south 2,000 feet to just past Graham Drive (West Side)	\$1,200,000 +	\$24,145.32	\$1,200,000.00	<i>Note that, on December 18, 2013, the Council amended its recommendations to include this allotment toward a large multi-phased road-improvement/storm water project along Rockport Road. This contribution of \$24,145 can be committed in 2013 toward appraisal work necessary for the project and follows through on a recommendation in 2012 to use any remaining funds that year for this purpose.</i>
Leonard Springs -- 300 feet South of Walmart Entrance to Tapp Road	Unknown	\$0.00	Unknown	This is a County project to be constructed on land in the county that lies along a city-owned roadway. The design and total cost of the project are unknown at this time. The County sees the need for the project (which is evident with the path worn by pedestrians) and is interested in a contribution from the City. After learning that City residents to the south would probably use the sidewalk, the Committee agreed to contribute any funds remaining this year once there were adequate assurances that the project will be completed in the short term. The Committee also declared intent to contribute as much as \$15,000 toward this project over two years. <i>Note that, on December 18, 2013, the Council amended the recommendations to defer any contribution to this project until 2014 when the project moved forward to the point the money could be used.</i>
Total	\$373,699.00	\$275,000.00	\$1,307,199.00	

2012				
Site	Estimate	Recommendation		Comments
		ATF	Other Funds	
Third Street -- Overhill Drive to Travel Lodge Driveway (North S	\$154,474.00	\$154,474.00		See the 2011 and 2010 descriptions below for the details of the larger project, which will result in the construction of sidewalks on the north side of East Third Street from Union to the SR 45/46 Bypass. Contributions from other sources include: \$100, 00 from Greenways; \$75,000 from HAND; and the installation of sidewalks by INDOT as part of the SR 45/46 Bypass project.
Mitchell Street -- Maxwell Lane to Circle Drive	\$1,100.00	\$1,100.00		This project proposes the use of lane markings to designate a portion of the west side of the roadway of this one-block segment as a pedestrian corridor. It would provide a pedestrian facility that connects a City-created pedestrian corridor on the south, which runs from Bryan Park to sidewalks at Marilyn Drive and High Street, to City-installed sidewalks along Maxwell Lane. <i>Note: This recommendation was conditioned upon approval of the associated removal of parking on that side of the street. Please also note that the lane was eventually approved for the east side.</i>
Morningside Drive -- Saratoga to Sheffield (West Side)	\$19,866.00	\$19,866.00		This recommendation continues upon the completed 2011 recommendation to install a sidewalk from Smith Road to Saratoga. Please see the 2011 description below for more information about this project
Rockport Road -- Coolidge to 310 feet North of the Intersection (West Side)	\$80,440.00	\$34,560.00	*	This recommendation would partially fund the sidewalk project by contributing funds toward the cost of acquiring the right-of-way. It is intended to leverage other resources to fill-in one of three missing sidewalk links along Rockport Road from Tapp Road to Rogers Street in 2012. The other missing links include a long section north of Tapp Road which will be constructed as part of the roundabout at that intersection and a segment north of Ralston, which remains unfunded. <i>Note: This recommendation would allow any remaining funds to be applied towards the cost of right-of-way and is conditioned upon Committee acceptance of assurances that the sidewalk will be completed in 2012.</i> <i>* CBU staff have inspected the site and offered suggestions on handling the storm water.</i>
Total	\$255,880.00	\$210,000.00	\$0.00	

2011				
Site	Estimate	Recommendation		Comments
		ATF	Other Funds	
Third Street -- Segments 1-4: Bryan to Hillsdale	\$387,405.00	\$129,811.00	\$175,000.00	See 2010 description below for project details. The 2010 Committee dedicated the bulk of its funds to the E. Third Street project. After applying 2010 funds to this project, \$129,811 was need for the completion of Segments 1-4. The other funds include \$100, 00 from Greenways & \$75,000 from HAND.
Third Street -- Segment 5: Hillsdale to Travel Lodge	\$300,893.00			Design for this project will be completed with 2010 funds.
Southdowns -- Jordan to Mitchell (with exploring the possibility of CBU making an in-kind contribution toward stormwater improvement)	\$53,153.00	\$50,622.00		With the completion of Marilyn Drive sidewalk in 2011, this segment would culimate a multi-year effort to create a continuous pedestrian corridor running from Bryan Park to the sidewalks at High and Covenancter. he stormwater component of this project is \$16,000. The Committee requested that CBU make a good-faith effort to explore whether they would be able to make an in-kind contribution re: the stormwater component of this project.
Morningside Drive – Smith to Saratoga (side of road to be TBD)	\$13,929.00	\$13,929.00		This project is intended to provide a pedestrian route to compensate for the loss of a Bloomington Transit bus stop on Morningside Drive. The closest stop is now on Smith Road and many people walk down Morningside to get to the stop at Smith. The walk is precarious and uncomfortable. This is a neighborhood with many children and a neighborhood that sees many pedestrians. A sidewalk would really help pedestrians get safely to the Smith stop
West 17th -- Woodburn to Madison (southside)	\$282,878.00	\$15,638.00		This is a highly rated, but expensive, project that has been under consideration by the Committee for many years. Funds remaining after the other projects are covered will be used the design of this project (\$25,000). The design should lower the cost of the project.
Total:	\$1,038,258.00	\$210,000.00	\$175,000.00	
2010				
Site	Estimate	Recommendation		Comments
		ATF	CBU Stormwater	
Marilyn -- Nancy to High (south side)	\$189,937.45	\$98,373.43	\$91,564.00	See 2009 description below for project details. As federal funds requested from the Mayor were not available for 2010, the Committee agreed to dedicate ATF funds to complete this project.
Third Street -- Bryan to Jefferson (north side)	\$95,408.78		\$22,638.00	Connection is needed from Roosevelt to the SR 46 Overpass to link up with the existing sidewalk. The 2009 Committee forwarded a recommendation to the 2010 Committee encouraging the latter to fund as much of this project as possible. The 2010 Committee agreed that, after funding the above previously-committed Marilyn project, it should devote all remaining funds to the Third Street project. The Committee voted to fully fund the first
Third Street -- Jefferson to Roosevelt (north side)	\$63,507.68	\$31,912.23	\$4,366.00	
Third Street -- Roosevelt to Clark (north side)	\$118,387.50	\$114,252.60	\$4,135.00	
Southdowns -- Jordan to Mitchell (w/Stormwater on Jordan and Sheridan) (south side)	\$124,405.05		\$54,562.20	This is part of larger area in need of stormwater improvement and has been on the Sidewalk Committee's list of requested projects since 2002. The Committee agreed to address the stormwater issue on Southdowns first and then the sidewalk later. The amount of stormwater dedicated to this project is not to exceed the original estimated cost -- \$54,562.20
Total:		244,538.26	\$177,265.20	

2009				
Site	Estimate	Recommendation		Comments
		ATF	CBU Sidewalk	
Marilyn -- Nancy to High (south side)	\$189,937.45	\$0.00	\$91,564.00	This is one of the last segments of a route on the Bicycle and Pedestrian Transportation and Greenways System (Greenways) Plan that would connect Bryan Park with sidewalks at High and Covenanter. Prior ATF funds were used to install sidewalks on Mitchell, Circle, Ruby and Nancy Street. Last year the Committee requested and expected that the Greenways monies would be used to cover the sidewalk and the CBU Set Aside would cover the storm water component of this project. However, an amendment to the Greenways Plan and other projects left this one unfunded in 2008. As noted above, the Committee recommended that the Council respectfully request that the Mayor consider appropriating \$98,937.45 of federal reimbursement of matching funds to complete this project.
Henderson -- Moody to Thornton (east side)	\$99,319.17	\$71,877.77	\$27,441.40	This project was scheduled for funding in 2008. It was requested by the Planning Department, MCCSC, and a property owner and would complete the last segment of unfinished sidewalk on the east side of Henderson between Hillside and Miller Drive as well as much further north and south. The HAND department may help fund some of this project.
Kinser Pike -- Marathon Stn. to 45/46 (west side)	\$54,751.14	\$40,280.74	\$14,470.40	This is a heavily-travelled stretch. Many residents living in multi-family housing walk here to the grocery store and other amenities.
Moore's Pike -- Segment A - Woodruff to existing walk (south side)	\$22,758.00	\$22,758.00	\$0.00	This stretch provides connectivity with an existing walk and was requested by area residents. This project will provide residents with a safer crossing of Moore's Pike. Some residents indicated that they would be willing to make a contribution.
S. Madison -- 3 rd to Prospect (east side)	\$49,773.00	\$26,989.00	\$16,784.00	This project is in a highly-urban area and would link to the B-Line trail at the W. 3 rd Street overpass. Public Works will commit \$6,000 for concrete.
3 rd Street -- Roosevelt to Clark & Clark to Hillsdale (north side)	\$231,564.07	\$50,000 *	\$0.00	Connection to link up to the existing sidewalk network. A worn pedestrian path demonstrates the heavy use of this area. The 2009 Committee agreed that if the funds remaining for the above projects are not needed to complete said projects, up to \$50,000 of the remaining 2009 ATF balance shall be dedicated to right-of-way acquisition for this project.
Total:		211,905.51	\$150,259.80	

2008				
Site	Estimate	Recommendation		Comments
		ATF	CBU Sidewalk/ Stormwater	
5th Street -- Hillsdale to Deadend (south side)	\$535,088.97	\$70,485.63	\$0.00	This two-block long, multi-departmental project provides an east-west connection through the Greenacres Neighborhood and needed stormwater infrastructure for the area. Total funding includes: \$112,934.36 (2007 ATF), \$10,453.98 (2007 CBU Sidewalk/Stormwater Setaside); \$216,215 (CBU Capital Project), and \$125,000 (HAND Neighborhood Improvement Grant). Note: This project was completed in 2008.
Henderson -- Allen to Hillside (west side)	\$669,090.00	* \$3,667.21	\$0.00	This improvement is aimed at alleviating pedestrian/vehicular conflict in this elementary school area. The Committee funded design in 2007 at the request of Public Works. Public Works received a \$250,000 Safe Routes to School grant for this project and wanted an additional sign of support from the Council in order to garner funds from other sources (including CDBG). * Note: The Committee recommended that any funds remaining in 2008 may be applied to this project.
Marilyn -- Nancy to High (south side)	*\$167,578.63	\$0.00	* \$62,480	This is one of the last segments of a route on the Alternative Transportation and Greenways Plan that would connect Bryan Park with sidewalks at High and Covenanter. Prior ATF funds were used to install sidewalks on Mitchell, Circle, Ruby and Nancy Street. The Committee requests that Alternative Transportation and Greenways monies fund the \$105,098.63 needed for the sidewalk portion of this project. *Note: The Committee also realized that the stormwater component will be more expensive than indicated and authorized that any remaining funds be used for this purpose.
E. 2nd Street -- Woodcrest to 300' east (north side)	\$34,300.00	\$32,319.00	\$1,981.00	This small project would fill-in the last missing stretch of sidewalk on both sides of East 2nd from College Mall Road to High Street, which sees high levels of vehicular and pedestrian traffic. Note: ATF funded design of this project in 2006. Note: This project was completed in 2008.
Henderson -- Thornton to Moody (east side)	\$71,735.90	\$49,405.90	\$22,330.00	This will complete a missing link on the east side of Henderson and provide uninterrupted sidewalks and crossings on that side of the street for at least a mile.
High Street - Across from Childs School (west side)	\$22,362.55	\$21,078.05	\$577.50	This project would create a continuous sidewalk on the west side of High Street across from Childs School, which has the highest walk-in rates in the community. The sidewalk may also allow the City to eliminate one crossing guard. Note: This project was completed in 2008.
West 17th Street -- Lindberg to Arlington Park Drive (south side)	\$52,077.21	\$27,337.21	\$0.00	A new development at the corner of W. 17th and Crescent Road led to this request. The total project should cost about \$52,077.21, but the possible donation of right-of-way by abutting property owners and contribution of materials by the developer would lower the cost to the amount as listed here. Note: This project was completed in 2008.
Total:		204,293.00	\$87,368.50	* Note: Any remaining ATF monies may be applied to the Henderson - Allen to Hillside project and any remaining CBU sidewalk/stormwater funds may be applied to Marilyn - Nancy to High Street. Also, using the estimates for CBU Sidewalk/Stormwater projects as presented in this chart and the carryover of \$22,834.79 from 2007, there would be approximately \$60,466.29 available for future CBU Sidewalk/Stormwater projects.

2007				
Site	Estimate	Recommendation		Comments
		ATF	USB Stormwater	
5th Street -- Overhill to Deadend (south side)	\$262,685.80	\$92,646.50	\$29,344.60	This provides an east-west connection through the Greenacres Neighborhood. * Note: The Committee committed to dedicate 2008 ATF monies to complete this project if the sum allotted is insufficient. This is part of a larger initiative to improve the stretch on 5th Street from Hillsdale to the deadend. CBU has dedicated
Henderson -- Allen to Hillside (west side)	unknown	\$45,000.00		Director of Public Works, Susie Johnson, requested that the Committee partner with Public Works by providing \$45,000 for the design cost of this project. This improvement is aimed at alleviating congestion and improving safety in this elementary school area.
Arden -- Windsor to High (south side)	\$100,452.00	\$47,353.50	\$53,098.00	The neighbors met with Councilmember Rollo and wanted a sidewalk to help their kids get to High Street and Southeast Park. Note: This project was completed in 2007.
Total:		185,000.00	\$82,442.60	
2006				
Site	Estimate	Recommendation		Comments
Queens Way, Sussex to High (south side)	\$25,969.68	\$25,969.68		This is the missing link, connecting High to Renwick.
Roosevelt, Fourth to Fifth (east side)	\$127,269.79 with curbs	\$127,269.79		This ties in with the recent improvements made by Doug McCoy which made Roosevelt a through-street.
Arden -- From High to Windsor (south side)	\$59,486.72	\$5,000 (design only)		This project provides a safe walk way for the neighborhood's many children to travel to a near-by school & park.
E. 2nd -- Woodcrest to 300' east (north side)	\$31,574.66	\$5,000 (design only)		This project is the missing link on the north side of the street from College Mall to the west. Justin suggested that in future years, the Committee might provide material and ask CBU to install.
11th Street-- Washington to Lincoln (north side)	\$60,151.41	\$10,000 (design only)		
Maxwell -- Highland to Jordan (north side)	\$65,658.98 with tree plot & piping	\$5,000 (design only)		This 2-block project completes the missing link on Maxwell between Henderson & High.
Maxwell -- Jordan to Sheridan (north side)	\$72,479.88 with tree plot & piping	\$5,000 (design only)		This 2-block project completes the missing link on Maxwell between Henderson & High.
Total:		\$183,239.47		

2005			
Site	Estimate	Recommendation	Comments
Maxwell Lane from Clifton Sidepath to High Street (north side)	\$65,175.00	\$65,175.00	Since 1999, the Committee has funded sidewalks on Maxwell Lane between Henderson and High Street. The first project was north of Bryan Park and ran from Henderson Street to Manor Road and connected to an existing sidewalk that runs to Jordan Avenue. The second project connected a sidewalk on Sheridan with the Clifton sidepath. This project would connect the latter sidewalk to High Street. The Committee recommended that a cross walk be placed on High (to connect with an existing sidewalk) and that sidewalk be placed to preserve trees, if that isn't possible, include a tree plot. Note: The project was rebid and completed in 2007 and was funded, in part, with the reappropriation of \$34,000 in reverted funds .
Queens Way from Chelsea to Sussex (south side)	\$35,729.00	\$35,729.00	The Renwick developer will install a sidewalk on the south side of Queens Way from the new development to Monclair Avenue. The Committee received estimates for installing sidewalks the rest of the way to High Street (\$83,700), funded the first leg between Montclair and Sussex in 2004.
Marilyn from Nancy to High Street (south side)	\$155,216 (one block only)	\$11,497.54 (design only)	This project begins completion of the western end of what's known as the Southeast Neighborhood Initiative. This initiative will eventually connect the walking/biking lane on Southdowns / Jordan with sidewalks at Covenanter / High Street. The City has already completed a sidewalk from Mitchell / Southdowns to Ruby / Nancy Street, and Nancy Street from Ruby to Marilyn Drive. This allocation funds design costs and gives staff an opportunity to determine whether there are storm water costs that might be borne by CBU. One more leg on Southdowns from Jordan to Mitchell would complete this initiative. Note: This project was completed in 2007.
Roosevelt from 4th to 5th (east side)	\$86,340.00	\$6,395.62 (design only)	This is a new project that would complement new private development on Roosevelt that will make it a through-street and include a sidepath on 4 th Street. The estimate for the project is \$86,340 and this recommendation funds the design costs.
Total:	\$187,244.00		
2004			
Site	Estimate	Recommendation	Comments
Sidewalk Project - 10th Street for 350 feet West of Grandview (south side)		\$45,000.00	The Council funded this proejct in 2003 and approximately \$6,344 was spent that year on designing the sidewalk and acquiring right-of-way, but the remaining funds were not encumbered for its construction. The Committee recommends using unspent and unencumbered funds from previous years to fund this project.
Sidewalk Project - Nancy Street from Ruby Lane to Marilyn Drive (west side)	\$45,628.00	\$45,628.00	The Committee recommended funding this segment of the larger South East Neighborhood Initiative. That initiative first received funding in 2002 (see below).
Sidewalk Project - Jefferson Street between 7th and 8th (east side)	\$114,000.00	\$114,000.00	The Committee recommended funding this first segment of the larger Jefferson Street project, which has been designed as a result of previous funding in 2002 (see below). This segment, unlike the others, does not require a large complement of storm water funds.
Sidewalk Project - Winfield Road from Fairoaks to existing sidewalk just south of Rechter (east side)	\$45,096.00	\$27,000 (+\$18,096 from Wininger/Stolberg)	The Committee recommended funding this project in concert with the developer of the Renwick PUD (Wininger / Stolberg) who has offered to pay for the cost of materials (approximately \$18,096).
Sidewalk Project - Queens Way from Montclair Avenue to Chelsea Court (south side)	\$22,139.00	\$22,139.00	The Committee recommended funding this and the previous project in order to have sidewalks in place before the Renwick PUD gets well under way.
Total:		\$253,767.00	This amount includes \$151,000 of funds appropriated for sidewalks this year and unspent monies from previous years. If there are not enough monies in the Alternative Transportation Fund in 2004, then the Committee will need to decide whether to recommend use of 2005 funds for these purposes.

2003			
Site	Estimate	Recommendation	Comments
Sidewalk Project - East 5th Street from 1 block east of Overhill (deadend) to Overhill.	\$255,596.00	\$52,597.00	On 6/18/03, the Council approved the Committee recommendation to allocate \$52,597 contingent upon the availability of storm water funds.
Sidewalk Project - 10th Street for 350 feet west of Grandview Drive (south side)	\$43,975.00	\$43,975.00	
Sidewalk Project - Walnut Street from Bank One (Country Club/Winslow) to Hoosier Street (west side)	\$104,354.00	\$63,427.00	On 6/2/03 the Committee recommended allocating the remaining funds (\$63,427) to this project and discussed ways to reduce its cost.
Total:		\$159,999.00	
2002			
Site	Estimate	Recommendation	Comments
Sidewalk Project - Southdowns from Jordan and along the north side of Circle and Ruby lane to Nancy Street.	\$148,000.00	\$108,731 (+ \$39,000 from Greenways)	The original estimate was for a sidewalk on the north side of the street, but the Engineering staff and neighborhood preferred south side at estimated cost of \$129,000 (and an additional \$19,000 for the leg from Jordan to Mitchel). On 6/19/02 the Council allocated \$59,547 for this project and, as noted below, on 12/18/02, the Council voted to shift \$49,184 from the East 2nd Street project to this one as well. On May 8, 2003 the Greenways group agreed to fund the remaining \$39,000.
Design for sidewalk and storm water project - Jefferson Street from East 3rd to East 10th Street.	\$27,840.00	\$27,840.00	
Design for sidewalk and stormwater project - East 5th Street from 1 block east of Overhill to Union.	\$28,832.00	\$28,832.00	
Streetscape Plan - East 2nd from High Street to College Mall Road.	\$49,184.00	\$0.00	On 12/18/02 the Common Council voted to shift these funds (\$49,184) to the Ruby Lane project (above)
Sidewalk design - East Allen from Lincoln to Henderson Street	\$4,000 - \$8,000	\$7,400.00	
Total:	about \$160,000	\$172,803.00	



MEMO FROM COUNCIL OFFICE ON:

**Resolution 22-05 – To Designate an Economic Revitalization Area, Approve The Statement of Benefits, and Authorize an Abatement Period for Real Property Improvements and Personal Property
Re: Properties at 1300 S Patterson Drive
(Catalent Indiana, LLC, Petitioner)**

Synopsis

This resolution designates nine parcels located at and around 1300 S. Patterson Drive as an Economic Revitalization Area (“ERA”) for Catalent Indiana LLC (“Petitioner”). This designation was recommend by the Economic Development Commission on January 31, 2022, and will enable the proposed \$350 million project including the real and personal property improvements to be eligible for tax abatement. The resolution approves Petitioner’s Statement of Benefits, authorizes a ten-year period of abatement for real property improvements, a twenty-year period of abatement for personal property, and sets the deduction schedules for each. The resolution also declares the intent of the Council to hold a public hearing on March 2, 2022, to hear public comment on the ERA designation.

Relevant Materials

- Resolution 22-05
 - Exhibit A (Map)
 - Petitioner’s Application for Tax Abatement
 - Statement of Benefits (Real Estate Improvements & Personal Property)
- Economic Development Commission Resolutions 22-01 and 22-02
- Staff memo from Alex Crowley, Director, Department of Economic & Sustainable Development
- City of Bloomington Tax Abatement Program: General Standards

Summary

Resolution 22-05 does the following:

1. It designates nine parcels of property located at and around 1300 S. Patterson Drive as an economic revitalization area;
2. It approves the Statements of Benefits (for both real estate improvements and for personal property); and
3. It authorizes a 50% abatement for real property taxes over a 10-year period and a 90% abatement of personal property taxes over a 20-year period. The abatements have an approximate total net present value of \$29.1 million.



Indiana Code [6-1.1-12.1-1\(1\)](#) defines an economic revitalization area (“ERA”) as an area within the city that has “become undesirable for, or impossible of, normal development and occupancy because of a lack of development, cessation of growth, deterioration of improvements or character of occupancy, age, obsolescence, substandard buildings, or other factors which have impaired values or prevent a normal development of property or use of property.” The resolution describes the boundaries of the area by describing its location by both parcel numbers and legal descriptions. This ERA designation allows for a deduction of property taxes for the redevelopment or rehabilitation of real property in the area.

Indiana Code [6-1.1-12.1-3\(b\)](#) provides that the Council may not designate the area as an ERA unless it finds:

- the estimate of the value of the redevelopment or rehabilitation is reasonable for projects of that nature;
- the estimate of the number of individuals who will be employed or whose employment will be retained can be reasonably expected to result from the proposed described redevelopment or rehabilitation;
- the estimate of the annual salaries of those individuals who will be employed or whose employment will be retained can be reasonably expected to result from the proposed described redevelopment or rehabilitation;
- any other benefits about which information was requested are benefits that can be reasonably expected to result from the proposed described redevelopment or rehabilitation
- the totality of benefits is sufficient to justify the deduction.

In designating the area an ERA, Indiana Code [6-1.1-12.1-2 \(i\)](#) provides that the Council may also impose certain limits, including limits on the time period during which the area shall be designated as an ERA, limits on the type and amount of deductions that will be allowed, and reasonable conditions related to the purpose of the state statute or to the *City’s Tax Abatement Program: General Standards (Standards)*. (A copy of the *City’s Tax Abatement Program: General Standards* is attached). The *Standards* outline evaluative criteria for considering a tax abatement petition stating that, “[e]ach project is reviewed on its own merits, and the effect of each project on the revitalization of the surrounding areas and employment is considered.” Basic eligibility is achieved through demonstrating the creation of capital investment as an enhancement to the tax base.

In addition to basic eligibility criteria, the *Standards* outline four primary other criteria that may be used in considering a tax abatement petition: 1) Quality of Life and Environmental/Sustainability; 2) Affordable Housing; 3) Community Service; and 4) Community Character. The *Standards* also allow for Petitioners to enumerate other contributions to local economic vitality that may not fit neatly within those categories.



City of Bloomington Indiana

City Hall | 401 N. Morton St. | Post Office Box 100 | Bloomington, Indiana 47402

Office of the Common Council | (812) 349-3409 | Fax: (812) 349-3570 | email: council@bloomington.in.gov

Note that with [Ordinance 97-06](#), the Council gave the Economic Development Commission (EDC) the responsibility for making recommendations regarding the foregoing to the Council. The EDC voted favorably to recommend this project to the Council on January 31, 2022 via [EDC Resolutions 22-01](#) and [22-02](#) (copies of these Resolutions are attached).

If the Council adopts [Resolution 22-05](#), the City Clerk is directed to publish the resolution and a notice of a public hearing in the newspaper announcing that the Council will consider a subsequent resolution on March 2, 2022 to confirm, modify, or rescind the earlier resolution. This notice and additional information will also be filed with the County Auditor, Assessor, and all affected taxing units for the property in question.

Contact

Alex Crowley, Department of Economic & Sustainable Development, 812-349-3477, crowleya@bloomington.in.gov

RESOLUTION 22-05

TO DESIGNATE AN ECONOMIC REVITALIZATION AREA, APPROVE THE STATEMENT OF BENEFITS, AND AUTHORIZE AN ABATEMENT PERIOD FOR REAL PROPERTY IMPROVEMENTS AND PERSONAL PROPERTY

**Re: Properties at 1300 S Patterson Drive
(Catalent Indiana, LLC, Petitioner)**

WHEREAS, Indiana Code § 6-1.1-12.1-1 *et seq.* specifies that the Common Council may designate an “Economic Revitalization Area” (“ERA”);

WHEREAS, the Common Council of the City of Bloomington updated and adopted Tax Abatement General Standards in Resolution 21-06 that established the standards to be used in finding an area to be an ERA; and

WHEREAS, Catalent Indiana, LLC, (“Petitioner”) filed an application for designation of property at and around 1300 South Patterson Drive, Bloomington, Indiana, comprised of the following Monroe County Parcel Numbers and Legal Descriptions as an ERA:

Parcel Numbers: 53-08-05-400-032.000-009
 53-08-05-400-033.000-009
 53-08-08-100-009.000-009
 53-08-08-100-043.000-009
 53-08-08-100-105.000-009
 53-08-08-100-131.000-009
 53-08-05-400-005.001-009
 53-08-08-200-001.000-009
 53-08-05-300-002.000-009

Legal Descriptions: 015-43770-00 SEM PT LOTS 42,54-57 & VAC ALLEY; L55
 015-43780-00 Seminary Part Lot 57 (57A)
 015-26440-02 PT NE NE 8-8-1W .576A; PLAT 143
 015-05330-04 IMI BATCH PLANT LOT 1C
 015-05330-02 IMI BATCH PLANT LOT 1A
 015-43600-00 PT N1/2 NE 8-8-1W 9.11A; PLAT 1
 015-18350-01 SEM Pt Lot 54 & Pt Lot 42; 0.98 A
 015-17120-01 PT N1/2 8-8-1W 79.877+7.46A Plats 217&523
 015-26610-02 SEM PT 171; .10A; L171;

WHEREAS, in Resolutions 15-06 and 19-03, the Common Council established and extended an ERA for Parcel 53-08-05-400-032.000-009 through December 31, 2033; and

WHEREAS, the current recommendation would expand and extend that ERA designation through no later than December 31, 2052, unless modified by action of the Common Council upon recommendation of the Economic Development Commission; and

WHEREAS, pursuant to Indiana Code § 6.1-1.1-12.1-2.5(a), City staff have prepared a map depicted the parcels proposed as an ERA, which is attached to this Resolution as Exhibit A; and

WHEREAS, according to its application, Petitioner has proposed investing \$350 million in real and personal property investments to expand its Bloomington plant (“Project”); and

WHEREAS, according to Petitioner’s Statement of Benefits, this Project would create 1,000 new full-time, permanent jobs with an average mean wage of \$30 per hour; and

WHEREAS, as required by Indiana Code, Bloomington Municipal Code, and a Memorandum of Understanding to be executed between the Petitioner and the City pursuant to the City of Bloomington Tax Abatement General Standards, the Petitioner shall

agree to provide information in a timely fashion each year to the County Auditor and the Common Council showing the extent to which the Petitioner has complied with its Statement of Benefits, complied with the City of Bloomington’s Living Wage Ordinance (B.M.C. 2.28), and complied with commitments specified in the Memorandum of Understanding; and

WHEREAS, the Project is located in the Thomson Allocation Area within the Consolidated Tax Increment Financing (“Consolidated TIF”) district, and Indiana Code § 6-1.1-12.1-2(k) provides that when a property is designated as an ERA for tax abatement purposes and is also located in a TIF allocation area, the Common Council must approve the Statement of Benefits by resolution; and

WHEREAS, the Common Council of the City of Bloomington—in Ordinance 97-06—gave the Economic Development Commission the responsibility for making recommendations to the Council regarding requests for tax abatement; and

WHEREAS, on January 31, 2022, the Economic Development Commission determined that the application met the statutory qualifications in Indiana Code § 6.1.1-12.1-1 *et seq.* and recommended designation of the Property as an ERA and approval of Petitioner’s Statement of Benefits and abatement application in Commission Resolutions 22-01 and 22-02; and

WHEREAS, Indiana Code §§ 6-1.1-12.1-17, -18 authorizes the Common Council to set an abatement schedule for real and personal property tax abatements, and the Council has reviewed Petitioner’s application and Statement of Benefits, both of which are attached and incorporated into this Resolution.

NOW, THEREFORE, BE IT HEREBY RESOLVED BY THE COMMON COUNCIL OF THE CITY OF BLOOMINGTON, MONROE COUNTY, INDIANA, THAT:

SECTION 1. The Common Council has investigated the area, reviewed the Application and Statement of Benefits, and finds the following:

- a. the estimate of the value of the Project is reasonable;
- b. the estimate of the number of individuals who will be employed can be reasonably expected to result from the Project as proposed;
- c. the estimate of the annual salaries of these individuals who will be employed can be reasonably expected to result from the Project as proposed;
- d. any other benefits about which information was requested are benefits that can be reasonably expected to result from the Project; and
- e. the totality of benefits is sufficient to justify the deduction.

SECTION 2. The Common Council determines that the nine (9) parcels of property at and around 1300 South Patterson Drive, composed of the parcels identified above, which is within the Thomson Allocation Area within the Consolidated Tax Increment Financing Area, is an “Economic Revitalization Area” as set forth in Indiana Code § 6-1.1-12.1-1, *et seq.*

SECTION 3. This designation shall expire no later than December 31, 2052, unless extended by actin of the Common Council and upon recommendation of the Bloomington Economic Development Commission.

SECTION 4. The Common Council finds that the Project will not negatively impact the ability of the Consolidated TIF allocation area to meet its debt obligations.

SECTION 5. Petitioner’s Statement of Benefits for its real and personal property improvements is hereby approved.

SECTION 6. The Common Council finds and determines the Petitioner, or its successors as allowed by the Memorandum of Understanding, shall be entitled to an abatement of real property taxes for the Project as provided in Indiana Code § 6-1.1-12.1-1, *et seq.*, for a period of ten (10) years with the following deduction schedule:

Year 1	50%
Year 2	50%
Year 3	50%
Year 4	50%
Year 5	50%
Year 6	50%
Year 7	50%
Year 8	50%
Year 9	50%
Year 10	50%

SECTION 7. The Common Council finds and determines the Petitioner, or its successors as allowed by the Memorandum of Understanding, shall be entitled to an abatement of personal property taxes for the Project as provided in Indiana Code § 6-1.1-12.1-1, *et seq.*, for a period of twenty (20) years with the following deduction schedule:

Year 1	90%	Year 11	90%
Year 2	90%	Year 12	90%
Year 3	90%	Year 13	90%
Year 4	90%	Year 14	90%
Year 5	90%	Year 15	90%
Year 6	90%	Year 16	90%
Year 7	90%	Year 17	90%
Year 8	90%	Year 18	90%
Year 9	90%	Year 19	90%
Year 10	90%	Year 20	90%

SECTION 8. In granting this designation and deductions the Common Council incorporates Indiana Code § 6-1.1-12.1-12 and also expressly exercises the power set forth in Indiana Code § 6-1.1-12.1-2(i)(6) to impose additional, reasonable conditions on the rehabilitation or redevelopment beyond those listed in the Statement of Benefits, and authorizes the City of Bloomington to negotiate a Memorandum of Understanding with the Petitioner specifying substantial compliance terms and consequences and remedies for noncompliance. In particular, failure of the property owner to make reasonable efforts to comply with the following conditions is an additional reason for the Council to rescind this designation and deduction:

- a. the land and improvements shall be developed and used in a manner that complies with local code;
- b. the Project shall be completed before or within twelve months of the completion date as listed on the application;
- c. Petitioner will comply with all compliance reporting requirements in the manner described by Indiana Code, Bloomington Municipal Code, and by the Memorandum of Understanding.

SECTION 9. The provisions of Indiana Code § 6-1.1-12.1-12 are hereby incorporated into this resolution, so that if the Petitioner ceases operations at the facility for which the deduction was granted and the Common Council finds that the Petitioner obtained the deduction by intentionally providing false information concerning its plans to continue operations at the facility, the Petitioner shall pay the amount determined under Indiana Code § 6-1.1-12.1-12(e) to the county treasurer.

SECTION 10. The Common Council directs the Clerk of the City to publish a notice announcing the passage of this resolution and requesting that persons having objections or remonstrances to the ERA designation appear before the Common Council at a public hearing on March 2, 2022.

PASSED AND ADOPTED by the Common Council of the City of Bloomington, Monroe County, Indiana upon this _____ day of _____, 2022.

Susan Sandberg, President
Bloomington Common Council

ATTEST:

NICOLE BOLDEN, Clerk
City of Bloomington

PRESENTED by me to the Mayor of the City of Bloomington, Monroe County, Indiana, upon this ____ day of _____, 2022.

NICOLE BOLDEN, Clerk
City of Bloomington

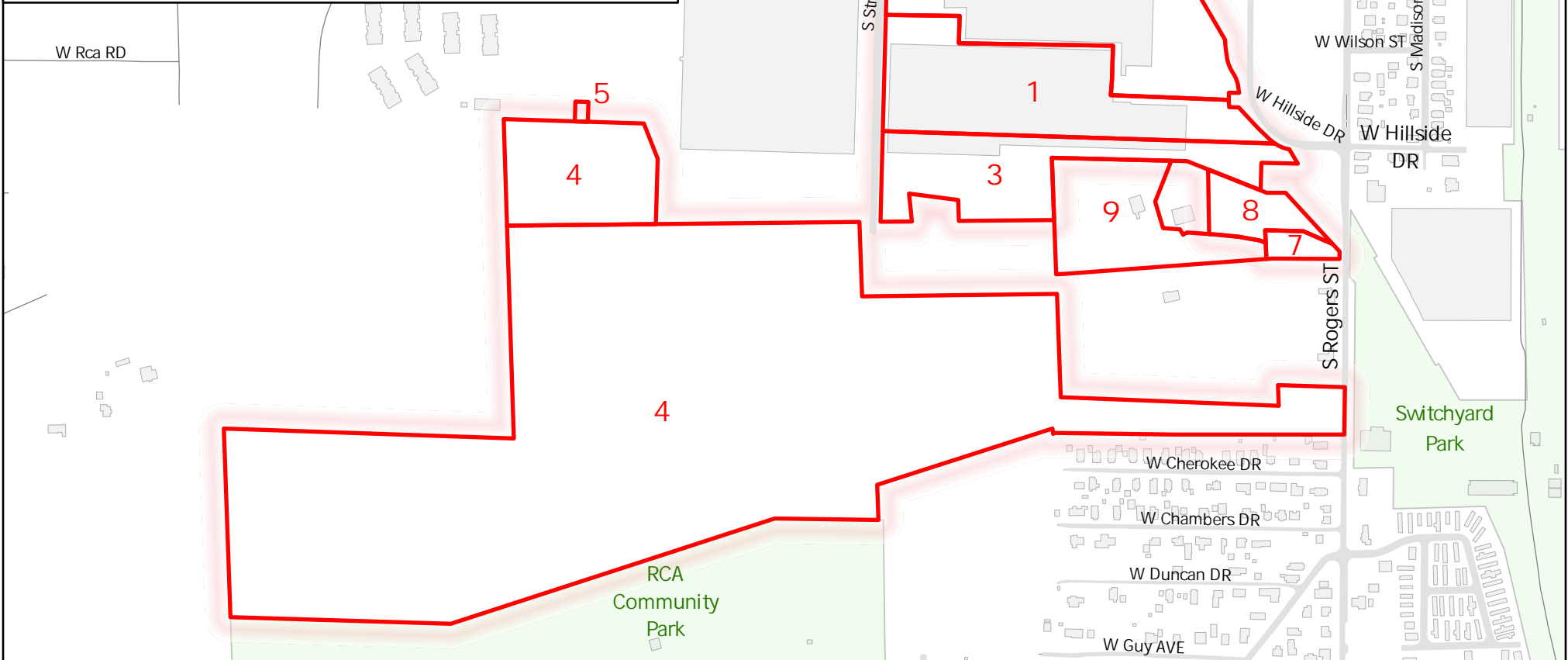
SIGNED and APPROVED by me upon this ____ day of _____, 2022.

JOHN HAMILTON, Mayor
City of Bloomington

SYNOPSIS

This resolution designates nine parcels located at and around 1300 S. Patterson Drive as an Economic Revitalization Area (“ERA”) for Catalent Indiana LLC (“Petitioner”). This designation was recommend by the Economic Development Commission on January 31, 2022, and will enable the proposed \$350 million project including the real and personal property improvements to be eligible for tax abatement. The resolution approves Petitioner’s Statement of Benefits, authorizes a ten-year period of abatement for real property improvements, a twenty-year period of abatement for personal property, and sets the deduction schedules for each. The resolution also declares the intent of the Council to hold a public hearing on March 2, 2022, to hear public comment on the ERA designation.

Identifier	Owner	Parcel Numbers	Legal Acreage
1	Cook Pharmica LLC	53-08-05-400-032.000-009	37.15
1	Cook Pharmica LLC	53-08-05-400-032.000-009	37.15
2	Cook Pharmica LLC	53-08-05-400-005.001-009	0.98
3	Cook Pharmica LLC	53-08-08-100-131.000-009	9.11
4	Monroe County B.O.C.	53-08-08-200-001.000-009	87.337
4	Monroe County B.O.C.	53-08-08-200-001.000-009	87.337
5	Monroe County B.O.C.	53-08-05-300-002.000-009	0.1
6	Catalent Indiana LLC	53-08-05-400-033.000-009	7.04
7	Catalent Indiana LLC	53-08-08-100-009.000-009	0.58
8	Catalent Indiana LLC	53-08-08-100-043.000-009	1.76
9	Catalent Indiana LLC	53-08-08-100-105.000-009	5.44





Application for Designation as an Economic Revitalization Area (ERA): Real Property Tax Abatement

City of Bloomington, Indiana
Department of Economic and Sustainable Development
401 N. Morton St., PO Box 100, Bloomington, Indiana 47402-0100
812.349.3418

INSTRUCTIONS

1. State law and City of Bloomington policy require that the designation application and statement of benefits form (SB-1) be submitted **prior to the initiation of the project** (i.e., prior to filing for building permits required to initiate construction). If the project requires a rezoning, variance, or approval petition of any kind the petitioner must file prior to submission of the tax abatement application, and must be approved prior to a final hearing on the tax abatement request.
2. All questions must be answered as completely as possible and must be verified with a signature on the completed Statement of Benefits Form (SB-1) and last page of this application. Incomplete or unsigned applications will not be accepted as official filings. If attaching additional pages, please label responses with corresponding Section numbers.
3. Return completed Application and **\$100.00 non-refundable Application Fee** (payable to the **City of Bloomington**) to City of Bloomington Department of Economic & Sustainable Development, PO Box 100, 401 N Morton Street, Suite 130, Bloomington, IN 47402-0100 (economicvitality@bloomington.in.gov).

Section 1 – Applicant Information	
Name of Company for which ERA Designation is being requested Catalent Indiana, LLC	
Primary Contact Information (for questions concerning this application and the Project)	
Name Jacob Everett	Job Title Consultant, Site Selection & Incentives
Phone (765) 425-9291 ext.	Email jeverett@mcguiresponsel.com
Address 201 N. Illinois Street, Suite 1000 (street and/or PO, city, ZIP) Indianapolis, IN 46204	
Compliance Contact Information (person responsible for completion and timely submittal of mandatory annual compliance forms if designation is granted)	
Name Reid Pittard	Job Title Senior Analyst
Phone (317) 296-6446 ext.	Email rpittard@mcguiresponsel.com
Address 201 N. Illinois Street, Suite 1000 (street and/or PO, city, ZIP) Indianapolis, IN 46204	

Section 2 – Real Property Location and Description		
Monroe County Tax Parcel ID Number(s) multiple, see SB-1	Township Perry	
Street Address 1300 S Patterson Dr & surrounding campus		ZIP 47403-
Current Zoning	Current Use(s) of Property life sciences	
Estimated Market Value of Property	manufacturing	
Property or Building(s) Listed as Historic on the City of Bloomington Historical Survey ? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes, check one:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Notable <input type="checkbox"/> Contributing	Age of Building(s), if applicable
Describe any other national or local historical significance or designation, if applicable n/a		
Please list all owners of the property. Catalent Indiana, LLC and Board Of Commissioners Of Monroe County		
Attach additional sheets as necessary to include all relevant property records. The City of Bloomington may require a copy of the property deed.		

Section 3 – Criteria for Economic Revitalization Area (“ERA”) or Economic Development Target Area (“EDTA”) Designation

Describe how the project property and surrounding area have become undesirable for normal development and occupancy.

Despite the wide range of activities permitted in the Thomson PUD and adjacent property, development lags potential in this area. Challenges to further development include: karst topography, flood plain, and potential environmental issues. Further, portions of the area lack infrastructure, present possible site challenges related to previous mining/excavation activity, and lack sufficient access.

Section 4 – Company Profile

Does your company currently operate at this location? Yes No

If yes, how long has your company been at this location? **acquired Cook Pharmica in 2017**

Will this property be your company’s headquarters location? Yes No

If no, where is/will be your company’s HQ? **Somerset, NJ**

Company is a: LLC LLP LP Corporation S. Corporation Nonprofit Corporation
 Mutual Benefit Corporation Other-Please describe:

Provide a brief description of your company history, products and services.

Catalent acquired Cook Pharmica in 2017. Catalent operates over 50 global sites which supply over 70 billion doses of more than 7,000 life pharma, biotech, & consumer health products.

Please list all persons and/or entities with ownership interests in the company. **Catalent Pharma Solutions**

Current/Retained Jobs and Wages (include only current permanent jobs, and exclude benefits and overtime from wage values)

Number of part-time employees	0	Median part-time hourly wage	n/a
Number of full-time employees	3,212	Average part-time hourly wage	n/a
TOTAL current employees (permanent jobs)	3,212	Median full-time hourly wage	
		Average full-time hourly wage	30
What is the lowest hourly wage in the company? (inc. PT, FT, other)	19		
What is the median hourly wage in the company (inc. PT, FT, other)		TOTAL Annual Payroll (current/retained)	200,428,800

New Jobs and Wages As Result of the Proposed Project (include only new permanent jobs, and exclude benefits and overtime from wage values)

Number of part-time employees	0	Lowest starting part-time wage	n/a
Number of full-time employees	1,000	Lowest starting full-time wage	19
TOTAL NEW employees (new permanent jobs)	1,000	TOTAL NEW Annual Payroll (new jobs only)	66,560,000

Describe your company’s benefit programs and include the approximate value of benefits for existing and new employees on a per hour basis (e.g., benefits are valued at an additional \$3.00 per hour, etc.)

Employees receive access to the following benefits: health insurance, dental insurance, vision insurance, life insurance, disability insurance, 401(k) with employer match, and an educational assistance program. The comprehensive benefits package provided to employees is valued at approximately \$10.00 per hour.

Market for Goods and Services; Local Sourcing

To the extent possible, please estimate the relative percentages of your company’s reach (via your products or services) into following markets:

	_____	Inside Monroe County, Indiana
	_____	Outside Monroe County, but inside Indiana
	_____	Outside of Indiana
	_____	Outside of the United States
	100%	

If applicable, list the name and location (City, State) of your five largest vendors or suppliers.

- 1.
- 2.
- 3.
- 4.
- 5.

Section 5 – Proposed Improvements (the “Project”)

Describe all real estate improvements for which tax abatement on the property is being sought.

Applicant is considering building improvements to support increased manufacturing capacity as well as potential future new construction. If tax abatement is approved, real property improvements would occur in phases on property currently owned and may also include additional property acquisitions.

Estimated Total Project Cost (Capital Improvements only) **\$350,000,000.00**

Estimated Construction Start Date (month-year) **March 2022**

Estimated Completion Date (month-year) **December 2026**

Has Bloomington Planning approval been obtained for the Project? Yes No
If yes, Case Number:

Will the Project require any City expenditures (for public infrastructure, etc.)? Yes No

If yes, please describe **Company working with CBU to determine required infrastructure upgrades**

Proposed Use(s) of the property after Project completion. Describe uses for entire Project space, including any uses not of the applicant company (e.g., if portions of space are intended to be leased to other entities, provide details).

life sciences manufacturing along with supporting R&D, distribution, and administration

Describe the impact on your business if the proposed Project is **not** undertaken (e.g. loss of jobs, contract cancellations, loss of production, change in location, etc.).

Project is critical to company's ability to remain competitive and pursue additional growth opportunities

Attach renderings, site plans, drawings, etc., of the Project.

Section 6 – City of Bloomington Evaluative Criteria

Describe how the Project will make a significant positive contribution to the community’s overall economic vitality in at least one of the following areas which apply. Feel free to add details to any and all other categories which apply. See “General Standards” for explanations and examples.

Quality of Life, Environmental Stewardship, and/or Sustainability

- **Awarded LEED Silver certification for Catalent’s Building C that manufactures the J&J COVID-19 vaccine.**
- **Delivered > 4% energy savings in FY21 & > 4% additional active in FY22 (on-track to exceed the 15% Catalent target).**
- **Implemented solar heating hot water supporting the cafeteria**
- **Installed more efficient plant boiler controls**
- **Installing LED lighting in all non-manufacturing spaces by April 2022**

Affordable Housing

Community Service

Community Character

If applicable, describe any further (not yet described above) beneficial *and detrimental* impact to the community’s economic, social or environmental wellbeing, resulting from the Project.

Attach any additional information or documentation you feel to be pertinent to the City's decision to authorize this tax abatement.

Section 7 – Certification:

The undersigned hereby certify the following:

[Initials]

- JE ■ The statements in the foregoing application for tax abatement are true and complete.
- JE ■ The person(s) executing this application for tax abatement have been duly authorized by the business entity for which this application is being filed to execute and file this application, and all required approvals by the appropriate board or governing body of the business entity have been received.
- JE ■ The individual(s) or business entity that is applying for Economic Revitalization Area (ERA) or Economic Development Target Area (EDTA) designation or approval of a Statement of Benefits is not in arrears on any payments, fees, charges, fines or penalties owed to the City of Bloomington, Indiana, including but not limited to, City of Bloomington Utilities, Bloomington Transit, and any other City departments, boards, commissions or agencies.
- JE ■ I/we understand that if the above improvements are not commenced (defined as obtaining a building permit and actual start of construction) within 12 months of the date of the designation of the above area as an ERA, EDTA or of approval of a Statement of Benefits for the above area, whichever occurs later, the Bloomington Common Council shall have the right to void such designation.
- JE ■ I/we understand that all companies requesting ERA and/or EDTA designation will be required to execute a Memorandum of Agreement (MOA) with the City. The MOA shall contain the capital investment levels, job creation and/or retention levels and hourly wage rates and other benefits that the applicant has committed to the City in order to receive consideration for the designation. The MOA shall also contain information relative to what the City and applicant have agreed upon as "substantial compliance" levels for capital investment, job creation and/or retention and wage rates and/or salaries associated with the project.

Additionally, the MOA shall indicate that the City, by and through the Economic Development Commission and the City of Bloomington Common Council, reserves the right to terminate a designation and the associated tax abatement deductions if it determines that the applicant has not made reasonable efforts to substantially comply with all of the commitments, and the applicant's failure to substantially comply with the commitments was not due to factors beyond its control.

If the City terminates the designation and associated tax abatement deductions, it may require the applicant to repay the City all or a portion of the tax abatement savings received through the date of such termination. Additional details relative to the repayment of tax abatement savings shall be contained in the Memorandum of Agreement.
- JE ■ I/we understand that if this request for property tax abatement is granted that I/we will be required to submit mandatory annual compliance forms as prescribed by State law and local policy. I/we also acknowledge that failure to do so or failure to achieve investment, job creation, retention and salary levels contained in the final resolution and MOA may result in a loss of tax abatement deductions and the repayment of tax abatement savings received.
- JE ■ I/we understand that beneficiaries of a city tax abatement are subject to the City of Bloomington's Living Wage Ordinance ([BMC 2.28](#)), and therefore I/we must certify the entity's Living Wage compliance annually during the tax abatement term, if this abatement request is approved.

OWNER(S) OR AUTHORIZED REPRESENTATIVE(S)

SIGNATURE (Print Name Below)	TITLE	DATE
X <u>JE</u> Jacob Everett	Advisor	Jan 21, 2022
X _____ Printed Name	_____	_____



**STATEMENT OF BENEFITS
PERSONAL PROPERTY**

State Form 51764 (R5 / 1-21)

Prescribed by the Department of Local Government Finance

FORM SB-1 / PP

PRIVACY NOTICE

Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

INSTRUCTIONS:

1. This statement must be submitted to the body designating the Economic Revitalization Area prior to the public hearing if the designating body requires information from the applicant in making its decision about whether to designate an Economic Revitalization Area. Otherwise this statement must be submitted to the designating body **BEFORE** a person installs the new manufacturing equipment and/or research and development equipment, and/or logistical distribution equipment and/or information technology equipment for which the person wishes to claim a deduction.
2. The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the installation of qualifying abatable equipment for which the person desires to claim a deduction.
3. To obtain a deduction, a person must file a certified deduction schedule with the person's personal property return on a certified deduction schedule (Form 103-ERA) with the township assessor of the township where the property is situated or with the county assessor if there is no township assessor for the township. The 103-ERA must be filed between January 1 and May 15 of the assessment year in which new manufacturing equipment and/or research and development equipment and/or logistical distribution equipment and/or information technology equipment is installed and fully functional, unless a filing extension has been obtained. A person who obtains a filing extension must file the form between January 1 and the extended due date of that year.
4. Property owners whose Statement of Benefits was approved, must submit Form CF-1/PP annually to show compliance with the Statement of Benefits. (IC 6-1.1-12.1-5.6)
5. For a Form SB-1/PP that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/PP that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. (IC 6-1.1-12.1-17)

SECTION 1 TAXPAYER INFORMATION								
Name of taxpayer Catalent Indiana, LLC			Name of contact person Nicki Jones, Controller					
Address of taxpayer (number and street, city, state, and ZIP code) 14 Schoolhouse Road Somerset NJ 08873				Telephone number (812) 803-0768				
SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT								
Name of designating body City of Bloomington Common Council				Resolution number (s)				
Location of property Personal Property Parcel #53-109-18003-37, physical location: 1300 South Patterson Drive Bloomington, IN and surrounding			County Monroe		DLGF taxing district number 53-009 Bloomington City Perry Township			
Description of manufacturing equipment and/or research and development equipment and/or logistical distribution equipment and/or information technology equipment. (Use additional sheets if necessary.) life sciences manufacturing equipment and supporting R&D, Logistics, and IT equipment				ESTIMATED				
					START DATE	COMPLETION DATE		
				Manufacturing Equipment	01/01/2022	12/31/2026		
				R & D Equipment	01/01/2022	12/31/2026		
				Logist Dist Equipment	01/01/2022	12/31/2026		
			IT Equipment	01/01/2022	12/31/2026			
SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT								
Current Number 3212	Salaries \$30/hr avg	Number Retained 3212	Salaries \$30/hr avg	Number Additional 1000	Salaries \$32/hr avg.			
SECTION 4 ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT								
NOTE: Pursuant to IC 6-1.1-12.1-5.1 (d) (2) the COST of the property is confidential.	MANUFACTURING EQUIPMENT		R & D EQUIPMENT		LOGIST DIST EQUIPMENT		IT EQUIPMENT	
	COST	ASSESSED VALUE	COST	ASSESSED VALUE	COST	ASSESSED VALUE	COST	ASSESSED VALUE
Current values								
Plus estimated values of proposed project	337,000,000		1,000,000		1,000,000		1,000,000	
Less values of any property being replaced								
Net estimated values upon completion of project								
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER								
Estimated solid waste converted (pounds) _____			Estimated hazardous waste converted (pounds) _____					
Other benefits:								
SECTION 6 TAXPAYER CERTIFICATION								
I hereby certify that the representations in this statement are true.								
Signature of authorized representative 				Date signed (month, day, year) January 21, 2022				
Printed name of authorized representative Andrew Espejo			Title General Manager					

FOR USE OF THE DESIGNATING BODY

We have reviewed our prior actions relating to the designation of this economic revitalization area and find that the applicant meets the general standards adopted in the resolution previously approved by this body. Said resolution, passed under IC 6-1.1-12.1-2.5, provides for the following limitations as authorized under IC 6-1.1-12.1-2.

A. The designated area has been limited to a period of time not to exceed _____ calendar years * (see below). The date this designation expires is _____. *NOTE: This question addresses whether the resolution contains an expiration date for the designated area.*

B. The type of deduction that is allowed in the designated area is limited to:

1. Installation of new manufacturing equipment;	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Enhanced Abatement per IC 6-1.1-12.1-18 <i>Check box if an enhanced abatement was approved for one or more of these types.</i>
2. Installation of new research and development equipment;	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
3. Installation of new logistical distribution equipment.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
4. Installation of new information technology equipment;	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

C. The amount of deduction applicable to new manufacturing equipment is limited to \$ _____ cost with an assessed value of \$ _____. *(One or both lines may be filled out to establish a limit, if desired.)*

D. The amount of deduction applicable to new research and development equipment is limited to \$ _____ cost with an assessed value of \$ _____. *(One or both lines may be filled out to establish a limit, if desired.)*

E. The amount of deduction applicable to new logistical distribution equipment is limited to \$ _____ cost with an assessed value of \$ _____. *(One or both lines may be filled out to establish a limit, if desired.)*

F. The amount of deduction applicable to new information technology equipment is limited to \$ _____ cost with an assessed value of \$ _____. *(One or both lines may be filled out to establish a limit, if desired.)*

G. Other limitations or conditions *(specify)* _____

H. The deduction for new manufacturing equipment and/or new research and development equipment and/or new logistical distribution equipment and/or new information technology equipment installed and first claimed eligible for deduction is allowed for:

<input type="checkbox"/> Year 1	<input type="checkbox"/> Year 2	<input type="checkbox"/> Year 3	<input type="checkbox"/> Year 4	<input type="checkbox"/> Year 5	<input type="checkbox"/> Enhanced Abatement per IC 6-1.1-12.1-18 Number of years approved: _____ <i>(Enter one to twenty (1-20) years; may not exceed twenty (20) years.)</i>
<input type="checkbox"/> Year 6	<input type="checkbox"/> Year 7	<input type="checkbox"/> Year 8	<input type="checkbox"/> Year 9	<input type="checkbox"/> Year 10	

I. For a Statement of Benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17? Yes No
If yes, attach a copy of the abatement schedule to this form.
If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

Also we have reviewed the information contained in the statement of benefits and find that the estimates and expectations are reasonable and have determined that the totality of benefits is sufficient to justify the deduction described above.

Approved by: <i>(signature and title of authorized member of designating body)</i>	Telephone number ()	Date signed <i>(month, day, year)</i>
Printed name of authorized member of designating body	Name of designating body	
Attested by: <i>(signature and title of attester)</i>	Printed name of attester	

* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

**IC 6-1.1-12.1-17
Abatement schedules**

Sec. 17. (a) A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
- (2) The number of new full-time equivalent jobs created.
- (3) The average wage of the new employees compared to the state minimum wage.
- (4) The infrastructure requirements for the taxpayer's investment.

(b) This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. Except as provided in IC 6-1.1-12.1-18, an abatement schedule may not exceed ten (10) years.

(c) An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.



**STATEMENT OF BENEFITS
REAL ESTATE IMPROVEMENTS**

State Form 51767 (R7 / 1-21)

Prescribed by the Department of Local Government Finance

20__ PAY 20__

FORM SB-1 / Real Property

PRIVACY NOTICE

Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

This statement is being completed for real property that qualifies under the following Indiana Code (*check one box*):

- Redevelopment or rehabilitation of real estate improvements (IC 6-1.1-12.1-4)
- Residentially distressed area (IC 6-1.1-12.1-4.1)

INSTRUCTIONS:

1. This statement must be submitted to the body designating the Economic Revitalization Area prior to the public hearing if the designating body requires information from the applicant in making its decision about whether to designate an Economic Revitalization Area. Otherwise, this statement must be submitted to the designating body **BEFORE** the redevelopment or rehabilitation of real property for which the person wishes to claim a deduction.
2. The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the initiation of the redevelopment or rehabilitation for which the person desires to claim a deduction.
3. To obtain a deduction, a Form 322/RE must be filed with the county auditor before May 10 in the year in which the addition to assessed valuation is made or not later than thirty (30) days after the assessment notice is mailed to the property owner if it was mailed after April 10. A property owner who failed to file a deduction application within the prescribed deadline may file an application between January 1 and May 10 of a subsequent year.
4. A property owner who files for the deduction must provide the county auditor and designating body with a Form CF-1/Real Property. The Form CF-1/Real Property should be attached to the Form 322/RE when the deduction is first claimed and then updated annually for each year the deduction is applicable. IC 6-1.1-12.1-5.1(b)
5. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/Real Property that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. IC 6-1.1-12.1-17

SECTION 1 TAXPAYER INFORMATION					
Name of taxpayer Catalent Indiana, LLC					
Address of taxpayer (number and street, city, state, and ZIP code) 14 Schoolhouse Road Somerset NJ 08873					
Name of contact person Nicki Jones, Controller		Telephone number (812) 803-0768		E-mail address nicki.jones@catalent.com	
SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT					
Name of designating body City of Bloomington Common Council				Resolution number	
Location of property see attached		County Monroe		DLGF taxing district number 53-009 Bloomington City Perry Township	
Description of real property improvements, redevelopment, or rehabilitation (use additional sheets if necessary) improvement, expansion, and/or new construction to house manufacturing, R&D, distribution, office, and other activities related to life sciences manufacturing				Estimated start date (month, day, year) 01/01/2022	
				Estimated completion date (month, day, year) 12/31/2026	
SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT					
Current Number 3,212.00	Salaries \$30.00	Number Retained 3,212.00	Salaries \$30.00	Number Additional 1,000.00	Salaries \$32.00
SECTION 4 ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT					
			REAL ESTATE IMPROVEMENTS		
			COST	ASSESSED VALUE	
Current values					
Plus estimated values of proposed project			10,000,000.00		
Less values of any property being replaced					
Net estimated values upon completion of project					
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER					
Estimated solid waste converted (pounds) _____			Estimated hazardous waste converted (pounds) _____		
Other benefits					
SECTION 6 TAXPAYER CERTIFICATION					
I hereby certify that the representations in this statement are true.					
Signature of authorized representative 				Date signed (month, day, year) January 21, 2022	
Printed name of authorized representative Andrew Espejo			Title General Manager		

FOR USE OF THE DESIGNATING BODY

We find that the applicant meets the general standards in the resolution adopted or to be adopted by this body. Said resolution, passed or to be passed under IC 6-1.1-12.1, provides for the following limitations:

A. The designated area has been limited to a period of time not to exceed _____ calendar years* (see below). The date this designation expires is _____. *NOTE: This question addresses whether the resolution contains an expiration date for the designated area.*

B. The type of deduction that is allowed in the designated area is limited to:
 1. Redevelopment or rehabilitation of real estate improvements Yes No
 2. Residentially distressed areas Yes No

C. The amount of the deduction applicable is limited to \$ _____.

D. Other limitations or conditions (specify) _____

E. Number of years allowed: Year 1 Year 2 Year 3 Year 4 Year 5 (* see below)
 Year 6 Year 7 Year 8 Year 9 Year 10

F. For a statement of benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?
 Yes No
 If yes, attach a copy of the abatement schedule to this form.
 If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

We have also reviewed the information contained in the statement of benefits and find that the estimates and expectations are reasonable and have determined that the totality of benefits is sufficient to justify the deduction described above.

Approved (signature and title of authorized member of designating body)	Telephone number ()	Date signed (month, day, year)
Printed name of authorized member of designating body	Name of designating body	
Attested by (signature and title of attester)	Printed name of attester	

* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

- A. For residentially distressed areas where the Form SB-1/Real Property was approved prior to July 1, 2013, the deductions established in IC 6-1.1-12.1-4.1 remain in effect. The deduction period may not exceed five (5) years. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. Except as provided in IC 6-1.1-12.1-18, the deduction period may not exceed ten (10) years. (See IC 6-1.1-12.1-17 below.)
- B. For the redevelopment or rehabilitation of real property where the Form SB-1/Real Property was approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. (See IC 6-1.1-12.1-17 below.)

IC 6-1.1-12.1-17

Abatement schedules

Sec. 17. (a) A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
- (2) The number of new full-time equivalent jobs created.
- (3) The average wage of the new employees compared to the state minimum wage.
- (4) The infrastructure requirements for the taxpayer's investment.

(b) This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. Except as provided in IC 6-1.1-12.1-18, an abatement schedule may not exceed ten (10) years.

(c) An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.

Real Property Location

Real property improvements owned, occupied, or otherwise used by Catalent Indiana, LLC or its subsidiaries and affiliates at any location on the following parcels:

- a. 53-08-05-400-033.000-009
- b. 53-08-08-100-009.000-009
- c. 53-08-08-100-043.000-009
- d. 53-08-08-100-105.000-009
- e. 53-08-05-400-032.000-009
- f. 53-08-08-100-131.000-009
- g. 53-08-05-400-005.001-009
- h. 53-08-08-200-001.000-009
- i. 53-08-05-300-002.000-009

**RESOLUTION 22-01
OF THE
ECONOMIC DEVELOPMENT COMMISSION
OF THE
CITY OF BLOOMINGTON, INDIANA**

DESIGNATION OF AN ECONOMIC REVITALIZATION AREA

WHEREAS, Indiana Code § 6-1.1-12.1-1 *et seq.* specifies that the Common Council may designate an Economic Revitalization Area;

WHEREAS, the Common Council of the City of Bloomington—in Ordinance 97-06—gave the Economic Development Commission (EDC) the responsibility for making recommendations to the Council regarding requests for tax abatement;

WHEREAS, the Common Council of the City of Bloomington updated and adopted Tax Abatement General Standards in Resolution 21-06 that established the standards to be used in finding an area to be an Economic Revitalization Area (ERA);

WHEREAS, City staff recommends the designation of the following Monroe County Parcel Numbers and Legal Descriptions as an Economic Revitalization Area:

Parcel Numbers:	53-08-05-400-032.000-009
	53-08-05-400-033.000-009
	53-08-08-100-009.000-009
	53-08-08-100-043.000-009
	53-08-08-100-105.000-009
	53-08-08-100-131.000-009
	53-08-05-400-005.001-009
	53-08-08-200-001.000-009
	53-08-05-300-002.000-009

Legal Descriptions:	015-43770-00 SEM PT LOTS 42,54-57 & VAC ALLEY; L55
	015-43780-00 Seminary Part Lot 57 (57A)
	015-26440-02 PT NE NE 8-8-1W .576A; PLAT 143
	015-05330-04 IMI BATCH PLANT LOT 1C
	015-05330-02 IMI BATCH PLANT LOT 1A
	015-43600-00 PT N1/2 NE 8-8-1W 9.11A; PLAT 1
	015-18350-01 SEM Pt Lot 54 & Pt Lot 42; 0.98 A
	015-17120-01 PT N1/2 8-8-1W 79.877+7.46A Plats 217&523
	015-26610-02 SEM PT 171; .10A; L171;

WHEREAS, in Resolutions 15-06 and 19-03, the Common Council established and extended an ERA for Parcel 53-08-05-400-032.000-009 through December 31, 2033;

WHEREAS, the current recommendation would expand and extend that ERA designation through no later than December 31, 2052, unless modified by action of the Common Council upon recommendation of the EDC;

WHEREAS, pursuant to Indiana Code § 6.1-1.1-12.1-2.5(a), City staff have prepared a map depicting the parcels proposed as an ERA, which is attached to this Resolution as Exhibit A; and

WHEREAS, the Economic Development Commission of the City of Bloomington, Indiana, has determined that the application falls within the statutory qualifications in Indiana Code § 6.1.1-12.1-1 *et seq.* and has voted to support the designation.

NOW, THEREFORE, BE IT RESOLVED BY THE ECONOMIC DEVELOPMENT COMMISSION OF THE CITY OF BLOOMINGTON THAT:

1. The Economic Development Commission of the City of Bloomington, Indiana recommends to the Common Council of the City of Bloomington that the application for the above-referenced location to be designated as an economic revitalization area be approved.
2. The EDC recommends that the Common Council's ERA designation expire no later than December 31, 2052.

APPROVED this _____ day of January, 2022.

Kurt Zorn, President

WITNESS:

Malcolm Webb, Secretary

**RESOLUTION 22-02
OF THE
ECONOMIC DEVELOPMENT COMMISSION
OF THE
CITY OF BLOOMINGTON, INDIANA**

RECOMMENDATION OF TAX ABATEMENT FOR CATALENT INDIANA, LLC

WHEREAS, the Economic Development Commission of the City of Bloomington, Indiana, recognizes the need to stimulate growth and to maintain a sound economy within the corporate limits of the City of Bloomington, Indiana; and

WHEREAS, Indiana Code § 6-1.1-12.1-1 *et seq.* provides for the designation of “Economic Revitalization Areas” (“ERA”) within which property taxes may be abated on improvements to real estate; and

WHEREAS, in addition to ERA designation, an applicant for tax abatement must receive the Common Council’s approval of the Statement of Benefits regarding the proposed project; and

WHEREAS, the Common Council of the City of Bloomington—in Ordinance 97-06—gave the Economic Development Commission the responsibility for making recommendations to the Council regarding requests for tax abatement; and

WHEREAS, the Common Council of the City of Bloomington updated and adopted Tax Abatement General Standards in Resolution 21-06 that established the standards to be used in finding an area to be an ERA; and

WHEREAS, Catalent Indiana LLC (“Petitioner”) proposes a potential \$350 million expansion of its current campus located at 1300 S Patterson Drive across a range of parcels that are depicted in Exhibit A (“Project”); and

WHEREAS, the Project will include real estate improvements and new personal property; and

WHEREAS, Indiana Code Section 6-1.1-12.1-18 allows for an enhanced abatement schedule on new personal property that may not exceed twenty (20) years, provided that the Common Council hold a public hearing to review the abatement following the tenth year; and

WHEREAS, new personal property qualifying for this abatement under Indiana Code Section 6-1.1-12.1-18 must be business personal property (1) that the Petitioner places in service after its statement of benefits is approved by City Council, and (2) that has not previously been used in Indiana before the Petitioner acquires the business personal property; and

WHEREAS, Petitioner has applied for a tax abatement on the real estate and personal property improvements associated with the Project (“Application”); and

WHEREAS, Petitioner’s Application includes a Statement of Benefits; and

WHEREAS, the Economic Development Commission of the City of Bloomington, Indiana, has met and considered Petitioner’s Application and Statement of Benefits; and

NOW, THEREFORE, BE IT RESOLVED BY THE ECONOMIC DEVELOPMENT COMMISSION OF THE CITY OF BLOOMINGTON THAT:

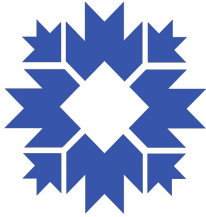
The following recommendations are made to the Common Council of the City of Bloomington, Indiana:

1. As indicated in EDC Resolution 22-01, nine (9) parcels be designated an Economic Revitalization Area, which are depicted in Exhibit A and identified by Monroe County as the following parcels:

53-08-05-400-033.000-009
53-08-08-100-009.000-009
53-08-08-100-043.000-009
53-08-08-100-105.000-009
53-08-05-400-032.000-009
53-08-08-100-131.000-009
53-08-05-400-005.001-009
53-08-08-200-001.000-009
53-08-05-300-002.000-009

2. Petitioner’s Project as outlined in its application and statement of benefits demonstrate that the Project would significant increase full-time, permanent living-wage jobs.
3. Petitioner’s Statement of Benefits regarding the Project be approved along with the following abatements:
 - a. For real property improvements for the project, a ten (10) year abatement with the following schedule pursuant to Indiana Code Section 6-1.1-12.1-17:

Year 1	50%
Year 2	50%
Year 3	50%
Year 4	50%
Year 5	50%
Year 6	50%
Year 7	50%
Year 8	50%
Year 9	50%
Year 10	50%



CITY OF BLOOMINGTON
economic & sustainable development

MEMORANDUM

To: Susan Sandberg, Council President
Common Council Members
Stephen Lucas, Counsel, Common Council

CC: John Hamilton, Mayor
Don Griffin, Deputy Mayor
Larry Allen, Assistant City Attorney, Legal Department
Jane Kupersmith, Economic & Sustainable Development
Jeff Underwood, Controller

From: Alex Crowley, Director, Department of Economic & Sustainable Development

Date: February 9, 2022

Re: Resolution 22-05: Real Property and Personal Property Tax Abatement Application
Catalent Indiana, LLC - 1300 S. Patterson Drive
(Monroe County Parcel ID Number: 53-08-05-400-033.000-009
53-08-08-100-009.000-009
53-08-08-100-043.000-009
53-08-08-100-105.000-009
53-08-05-400-032.000-009
53-08-08-100-131.000-009
53-08-05-400-005.001-009
53-08-08-200-001.000-009
53-08-05-300-002.000-009

EXECUTIVE SUMMARY

Resolution 22-05 designates an Economic Revitalization Area and approves real and personal property tax abatements for Catalent Indiana, LLC, in regard to its proposed expansion project to be located in the area surrounding its main campus located at 1300 S. Patterson Drive. This abatement will include both personal and real property and has an approximate total net present value of \$29.1 million. This project will potentially bring \$350 million in real and personal property investment to Bloomington along with a minimum of 1,000 new direct jobs in the next five (5) years.

The evolution of the manufacturing facility located near the southwest corner of South Patterson and South Rogers streets is a worthy example of successful public-private collaboration. Across several City administrations, City Councils, and private sector partners, the community has invested in and benefited from the site's transformation from an abandoned television production plant to a thriving, advanced

biologics facility that is at the forefront of the global effort against COVID-19 and already one of Bloomington's major employers. Since Catalent's arrival to Bloomington, the company has outperformed all previous abatement commitments.

Catalent operates a number of biologics sites across the US with which Bloomington is competing for this investment. The company is expected to make its final determination regarding this investment in the first half of 2022 to ensure its manufacturing and packaging capacity can keep up with growing demand for its services.

The proposed capital investment is heavily weighted toward new business equipment, which is currently subject to personal property taxation in the State of Indiana. Of the \$350 million total capital investment, Catalent projects that \$340 million (or approximately 97%) will be personal property investments.

The administration proposes to build upon a successful partnership to facilitate the company's further investment in Bloomington. The administration recommends a 20-year, enhanced abatement for the personal property investment, which is the first time the community has considered this tool, available in Indiana since 2014, and a 10-year real property abatement. If approved by Council, both abatements would be contingent upon Catalent investing and meeting its ongoing commitments as detailed in the tax abatement application documentation.

The administration recognizes the positive impact Catalent's wage and employment opportunities are having to help stimulate economic growth directly and indirectly across the Bloomington MSA and the positive income tax revenues that growth represents.

Under the criteria endorsed by Common Council and under Indiana Code 6-1.1-12.1, the City administration believes that this project is worthy of a tax abatement on the real and personal property improvements as recommended.

EXPANSION DETAILS

Expansion Overview

Catalent's campus comprises 62 acres, which hold four buildings, as well as the former IMI lot. The proposed investment is projected at \$350 million — \$10 million of which is Real Property and \$340 million of which is Personal Property. These investments will grow the current workforce by 1,000 new, full-time employees with an average wage of \$32.00 per hour.

These investments will facilitate:

- Expanded drug substance capacity in Building A (Parcel 1);
- Expanded drug product fill/finish capacity, additional quality control lab space, and expanded packaging capacity in Building B (Parcel 1);
- Expanded packaging capacity and additional cold storage in Building D (parcel 5);
- And the development of surface parking at the former IMI parcel.

Site and Abatement History

In 1997, Thomson Consumer Electronics announced its closure and intention to lay off 1,200 employees. In addition to the income loss associated with the 1,200 direct jobs, the City experienced an annual decline of \$1.5 million in annual local property and income taxes. A government task force at the time

estimated the Thomson directly or indirectly provided 2,350 jobs in the community with a total economic impact of \$277.1 million.

A coordinated community effort was initiated to redevelop the site and several economic tools, including a Tax Increment Finance District and the state's first Community Revitalization Enhancement District, were put into place to encourage new investment. Tools from the Bloomington Urban Enterprise Zone were also leveraged. A neighborhood strategies plan and a PUD were completed.

In 2004, Cook Pharmica LLC agreed to open its facility at the former Thomson site with an anticipated \$45 million in capital improvements and a goal of creating 200 jobs. It expanded again in 2008 (\$84 million capital investment) and 2015 (\$25 million capital investment), each time receiving support from the City through tax abatements, Community Revitalization Enhancement District (CRED) funding, or Enterprise Zone Investment Deductions.

In October 2017, Catalent, Inc., a New Jersey corporation, announced its purchase of Cook Pharmica for \$950 million. Catalent further announced that the company sought to retain Cook Pharmica's workforce and operations in Bloomington.

In 2019 Catalent announced its first onsite facility expansion and received approval for Real and Personal Property abatements. Phase I included the build-out of 15,000 SF of manufacturing space to expand the facility's packaging capacity and to add support to specialized device assembly. Phase II expanded the facility's drug product sterile filling capacity by 79,000 square feet and was completed in 2021.

As part of its 2019 tax abatement, Catalent committed to 839 retained jobs and 200 net new jobs. At the time of the filing of its 2021 CF-1s, Catalent significantly exceeded its 200-job commitment by an additional 748 net new jobs.

Additionally, Catalent projected to invest more than \$125,000,000 in capital improvements — \$40,000,000 in real property and \$85,000,000 in personal property — beginning in June 2019 and completing construction in November 2021. 2022 CF-1 filings will report final capital investment numbers relating to abatement 19-04.

These enhancements nearly doubled the Bloomington facility's filling capacity, expanded its packaging capabilities, and added new device assembly capabilities. Catalent now employs 3,212 people with a starting wage of \$19 per hour and an average wage of \$30 per hour.

In 2020, Catalent was declared an essential business by all the national and local governments where the company operates, allowing the company to sustain full employment during the COVID-19 pandemic. Nationally, they have been awarded work related to nearly 100 unique compounds investigated as potential COVID-19 vaccines. Catalent has robust operations outside of pandemic-related activities, and is planning for future growth.

In 2021 Catalent purchased a parcel from Best Beers for additional packing and refrigerated storage. The company also purchased a parcel from IMI to the south of its facility and are presently working with the City Planning Department for an acceptable plan that facilitates employee parking while mitigating stormwater run-off issues through site infrastructure.

CONTEXT

Wages & Cost of Living

In August 2020, according to the Bureau of Labor Statistics (BLS), the average Bloomington MSA wage was \$22.81 as of October 2021, or 11% below the national average, which was \$25.25 as of Q4 2021. According to the Indiana Business Review 2022 Forecast, income growth is projected to lag behind national growth by 0.4%, an increase of 0.1% from the previous year. Additionally, the BLS consumer price index for 2021 was an average of 7%, with increased cost of food at 6.3%, and more specifically prices for meats, poultry, fish, and eggs rose by 12.5%.

In addition to the high cost of food, the average home price locally increased by 15% over 2021 and statewide by 17.5%. Slow wage growth, combined with the above inflationary pressures make it essential that Bloomington seek to protect and grow high-quality jobs.

Bloomington's Competitive Advantages

Bloomington's education and workforce development assets, decades-long quality of life investments, life sciences sector strengths, and future growth plans position the city and region well to compete for Catalent's proposed expansion. These include the following examples:

Education and Workforce Development: Catalent leverages and provides opportunities for Indiana University's scientific community and 'trailing spouses,' providing the community an opportunity to attract and retain post-graduate university talent. As one of the nation's premier research universities and a significant presence in the Bloomington community, and as one of the community's top employers and home to more than 45,000 students, the University contributes significantly to Bloomington's ongoing economic vitality. IU academic programs align with sector development both through the hard sciences, and other academic units like the Kelley School's Center for the Business of Life Sciences.

Ivy Tech Bloomington's Office of Workforce Alignment also serves as a significant partner to workforce development for the life sciences in Bloomington. Ivy Tech helped develop and certify the Biomanufacturing Technician Apprenticeship Program and support professional development needs of Indiana's business, industry, nonprofit, and government sectors.

Monroe County Community School Corporation (MCCSC) ranks among the top twenty school districts in Indiana and offers diverse opportunities in academics, arts, and athletics. MCCSC serves approximately 11,000 students in twenty-three school buildings, including the Hoosier Hills Career Center, which plays a central role in workforce development. Hoosier Hills staff worked with local manufacturers to create the certified Biomanufacturing Technician Apprenticeship Program that is now offered by Ivy Tech Bloomington.

Life Sciences Sector: Local cluster development in the life sciences offers myriad benefits, and creates a fertile setting for Catalent's future growth, but without the additional support of the incentives detailed below, Bloomington would not remain competitive against other sites. Regional Opportunity Initiatives notes in its READI Development Plan that regional players include Baxter, Boston Scientific, Catalent, Cook Group, and may soon include CooperCompanies. Supporting organizations are Cook Polymer and Kimball Electronics. Total employment is 7,773 and the average wage is \$29.30. ROI sees that talent development as key to sustaining this sector.

Quality of Life: The City recently opened Bloomington's newest park, an award-winning amenity within walking distance to the southeast of the Company. The 65-acre site boasts a variety of features. The B-Line Trail traverses the park, connecting more than 9 miles of trails to neighborhoods in all directions, with additional trails in development. The City has stimulated the expansion of Bloomington's arts and culture assets and expanded its role as a regional arts destination. Bloomington's rich culture has attracted an expanding workforce seeking diverse and engaging quality of life opportunities.

Growth Plans: IU Health and Indiana University have created a new \$600+ million hospital and academic center on the Indiana SR 45/46 Bypass, leaving approximately 24 acres on its site downtown, within walking distance of the Company. The City will redevelop the former IU Health Hospital site into a new, densely developed neighborhood, Hopewell, immediately north of Catalent's proposed expansion. Hopewell will provide more than 800 workforce and other housing units and will feature commercial space and other neighborhood amenities. The City anticipates other development in the southwest quadrant of Bloomington that will include a substantial amount of housing and other amenities.

CRITERIA: CITY OF BLOOMINGTON TAX ABATEMENT GENERAL STANDARDS

Capital Investment as an enhancement to the tax base

Total estimated project capital investment is projected to be \$350 million. Based on the total estimated project assessed value, the new Real Property tax liability excluding the abatement is projected to grow \$207,000 annually on average, and an average of \$117,000 personal property. Over the total twenty-year life of the abatement, the project will increase Catalent's tax liability by an estimated \$34 million. If the abatements are approved, that liability would decrease to \$5 million. Both calculations are present value estimates and are based on 2022 Monroe County tax rates.

Evaluative Criteria

Besides capital investment and full-time job creation, the City's Tax Abatement General Standards describe additional criteria that may be considered to evaluate whether a project will make "a significant positive contribution to overall economic vitality" of the city. The petitioner may provide supportive evidence for how their project addresses the evaluative criteria. A summary of the application's category responses is below. Please also refer to the petitioner's application, which has been included in your packet.

Quality of Life/Environmental Sustainability: Catalent was awarded LEED Silver certification for Building C, which manufactures the J&J COVID-19 Vaccine. The company delivered over 4% energy savings in FY21 and is on track to meet its 15% FY22 target. The company implemented solar heating for hot water supporting the cafeteria, and installed more efficient plant boiler controls. The company is installing LED lighting in all non-manufacturing spaces by April 2022. In 2020, Catalent began issuing annual Corporate Responsibility reports, which communicate corporate responsibility strategy based on three pillars: Environment, People, and Community. These reports include specific goals and metrics related to energy use, waste diversion, and workforce diversification, among many others. For example, Catalent Corporate aims to have all sites zero waste to landfill by 2024.

Further, Catalent is actively engaged with the City's Transportation Demand Manager regarding the City's goals for reduction of single occupancy vehicle travel, specifically through the launch of the City's TDM website and app, which would be relevant for Catalent's employees.

CRITERIA: STATUTORY CONSIDERATIONS FOR ERA AND ABATEMENT SCHEDULE

Establishing an Economic Revitalization Area

Upon the EDC's favorable recommendation, the City Council will take the necessary legislative steps to review the abatement. In order for a property to be eligible for tax abatement, it must be designated an Economic Revitalization Area. Under Indiana Code § 6-1.1-12.1-1, an Economic Revitalization Area (ERA) is an area that has obstacles to "normal development and occupancy because of a lack of development, cessation of growth, deterioration of improvements or character of occupancy, age, obsolescence, substandard buildings, or other factors." It also includes areas where a facility or group of facilities are either technologically, economically, or energy obsolete and where the obsolescence may lead to a decline in employment and tax revenues.

As noted in the Project Background, Catalent's proposed expansion is taking place on the site of the former Thompson Consumer Electronics factory. This area has been an area that has been targeted for revitalization since the factory closing in 1997 and has remained largely undeveloped. In Common Council Resolutions 15-06 and 19-03, the Common Council declared one parcel in this area an ERA and extended that ERA through December 31, 2033. This proposal would extend that ERA designation and expand it to surrounding parcels that have yet to be developed on the former industrial site through December 31, 2047.

Rationale for Tax Abatement Recommendation

The findings required for designating an Economic Revitalization Area and authorizing a tax abatement following review of a statement of benefits from an applicant are:

- The estimate of the value of the redevelopment or rehabilitation is reasonable for the projects of that nature.
- The estimate of the number of individuals who will be employed or whose employment will be retained can be reasonably expected to result from the proposed described redevelopment or rehabilitation.
- The estimate of the annual salaries of these individuals who will be employed or whose employment will be retained can be reasonably expected to result from the proposed described redevelopment or rehabilitation.
- Any other benefits about which information was requested are benefits that can be reasonably expected to result from the proposed described redevelopment or rehabilitation.
- The totality of the benefits is sufficient to justify the deduction.

With the consideration of all factors outlined above, and especially recognizing the unique opportunity this development presents to substantially increase the availability of permanent, high-wage jobs in Bloomington, the City supports the property owner's application for tax abatement with the following terms: **10-year 50% real estate (RE) property tax abatement and 20-year 90% personal property (PP), abatement.** The total present value of both abatements based on 2021 tax rates is \$29.1 million.

Next Steps

Upon approval of Resolution 22-05, the Clerk would publish notice of a public hearing on March 2, 2022, for the ERA designation. The Council would then consider the confirmatory resolution at that public

hearing, where members of the public would be able to present public comment on the ERA designation and abatement.

Should the Council approve and confirm the tax abatement, the City will negotiate and execute the required Memorandum of Agreement with Catalent. This agreement will include claw back provisions (remedies and consequences for noncompliance) related to the benefits stated in the Application and Statement of Benefits (SB-1) forms, and will define other substantial compliance terms through the duration of the tax abatement periods. Additionally, Indiana Code Section 6-1.1-12.1-18 requires the Common Council to hold a public hearing on the 20-year enhanced personal property abatement to review compliance after the tenth year of the abatement.

Appendix 1: Tax Abatement Schedules

Appendix 2: Site Images

Attachments:

- Petitioner's City of Bloomington Tax Abatement Application
- Petitioner's Statement of Benefits Form, Real Estate Improvements (SB-1)

Tax Abatement Calculations for Real Property Improvement

Catalent, Inc. — 1300 S. Patterson Drive
Using 2021 District Rate and Project Estimates

Tax Rate:	2.0669%
Capital Improvements:	\$10,000,000
A/V Adjustment:	80%

Year	Abatement	Proj. Tax Liability*	Value Abated	Taxes Payable
1	50%	\$165,352	\$82,676	\$82,676
2	50%	\$165,352	\$82,676	\$82,676
3	50%	\$165,352	\$82,676	\$82,676
4	50%	\$165,352	\$82,676	\$82,676
5	50%	\$165,352	\$82,676	\$82,676
6	50%	\$165,352	\$82,676	\$82,676
7	50%	\$165,352	\$82,676	\$82,676
8	50%	\$165,352	\$82,676	\$82,676
9	50%	\$165,352	\$82,676	\$82,676
10	50%	\$165,352	\$82,676	\$82,676
		\$1,653,520	\$826,760	\$826,760
NPV (5% discount rate):		\$1,276,804	\$638,402	\$638,402
Average/Year:		\$165,352	\$82,676	\$82,676
20-year NPV:		\$2,060,651	\$638,402	\$1,422,249

Note: 10 year projected tax liability estimated.

*See Ind. Code § 6-1.1-4-4.5 for system of annual adjustment to the assessed value of real property.

Tax Abatement Calculations for Personal Property Improvement

Catalent, Inc. —1300 S. Patterson Drive
Using 2021 District Rate and Project Estimates

Tax Rate: 2.0669%
Capital Improvements: \$340,000,000
A/V Adjustment: See True Tax Value

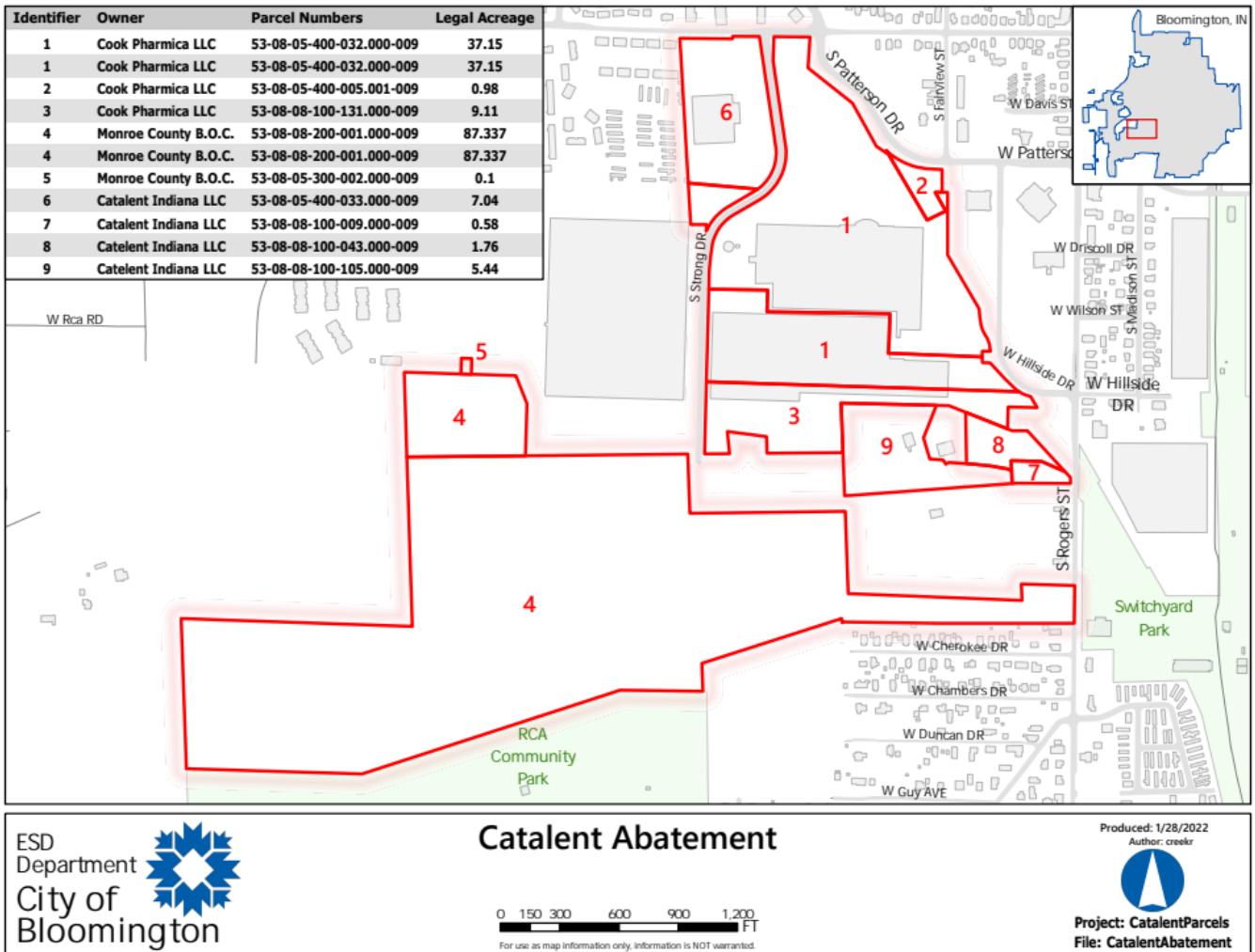
Year	Abatement	True Tax Value	Proj. Tax Liability*	Value Abated	Taxes Payable
1	90%	40%	\$2,810,984	\$2,529,886	\$281,098
2	90%	60%	\$4,216,476	\$3,794,828	\$421,648
3	90%	55%	\$3,865,103	\$3,478,593	\$386,510
4	90%	45%	\$3,162,357	\$2,846,121	\$316,236
5	90%	37%	\$2,600,160	\$2,340,144	\$260,016
6	90%	30%	\$2,108,238	\$1,897,414	\$210,824
7	90%	30%	\$2,108,238	\$1,897,414	\$210,824
8	90%	30%	\$2,108,238	\$1,897,414	\$210,824
9	90%	30%	\$2,108,238	\$1,897,414	\$210,824
10	90%	30%	\$2,108,238	\$1,897,414	\$210,824
11	90%	30%	\$2,108,238	\$1,897,414	\$210,824
12	90%	30%	\$2,108,238	\$1,897,414	\$210,824
13	90%	30%	\$2,108,238	\$1,897,414	\$210,824
14	90%	30%	\$2,108,238	\$1,897,414	\$210,824
15	90%	30%	\$2,108,238	\$1,897,414	\$210,824
16	90%	30%	\$2,108,238	\$1,897,414	\$210,824
17	90%	30%	\$2,108,238	\$1,897,414	\$210,824
18	90%	30%	\$2,108,238	\$1,897,414	\$210,824
19	90%	30%	\$2,108,238	\$1,897,414	\$210,824
20	90%	30%	\$2,108,238	\$1,897,414	\$210,824
			\$48,278,650	\$43,450,785	\$4,827,865
NPV (5% discount rate):			\$31,625,128	\$28,462,615	\$3,162,513
Average/Year:			\$2,413,933	\$2,172,539	\$241,393
NPV with 15% True Tax Value Floor (Legislative Action):			\$24,338,287	\$21,904,458	\$2,433,829
NPV with Immediate 30% True Tax Value:			\$26,273,305	\$23,645,975	\$2,627,331

Note: 10 year projected tax liability estimated.

*See Ind. Code § 6-1.1-3-1, et seq. for assessment of personal property.

Appendix 2: Site Images

Site Location: Exhibit A



City of Bloomington

Tax Abatement Program: General Standards

This document sets forth the General Standards under which the City of Bloomington may authorize deductions on the rehabilitation of real and personal property (also known as tax abatement), as allowed under Indiana law.

Program Description:

The City of Bloomington recognizes tax abatement as a useful economic development tool which can be implemented to improve the overall economic lives of citizens and to aid in achieving the Administration's vision of a strong and diverse economy, with an eye toward sustainability and balance. City of Bloomington tax abatements allow taxes on real estate improvements or eligible equipment installation to be phased in over a period of time, thus promoting new business and agencies and initiatives that improve the overall quality of life in our community. New construction, rehabilitation of existing buildings or installation of eligible equipment within designated ERAs receives tax abatement through a reduced assessed valuation on those improvements over a specified period of time.

Indiana law (Ind. Code § 6-1.1-12.1) allows up to ten year abatement on the increased assessed valuation due to construction or rehabilitation improvements in the areas of the city where development needs to be encouraged. I.C. § 6-1.1-12.1 also allows a one- to ten-year abatement on "new manufacturing equipment." The equipment must be used in "the direct production, manufacture, fabrication, assembly, extraction, mining, processing, refining or finishing or other tangible personal property; and never before used by its owner for any purpose in Indiana." Further, "enterprise information technology equipment" purchased after June 30, 2009 may also be eligible for abatement if the project is approved prior to January 1, 2013. See I.C. § 6-1.1-10-44 for the statutory definitions of "enterprise information technology equipment" and eligibility requirements.

The rate at which the new assessed valuation will be phased in for approved abatements is set forth by Indiana law (I.C. § 6-1.1-12.1-3 for real property; I.C. § 6-1.1-12.1-4.5 for eligible equipment or personal property). The City of Bloomington Economic Development Commission shall recommend a term of abatement for each project, which shall be authorized by the City Council in the process outlined below and allowed for by Indiana law. With respect to new construction and personal property, the City Council may choose to limit the dollar amount of the deduction that will be allowed.

Project Eligibility:

In order for a project to be eligible for tax abatement, the area in which it is located must be designated as an Economic Revitalization Area (ERA) by the City of Bloomington. Decisions to designate areas as ERAs are determined on a project-by-project basis for any project located within the corporate limits of the City of Bloomington.

An Economic Revitalization Area (ERA) must have “become undesirable for or impossible of, normal development and occupancy,” because of such factors as “a lack of development, cessation of growth, deterioration of improvements or character of occupancy, age, obsolescence, substandard buildings, or other factors which have impaired values or prevent a normal development of property or use of property,” and includes “any area where a facility or a group of facilities that are technologically, economically, or energy obsolete are located and where the obsolescence may lead to a decline in employment and tax revenues.” (I.C. § 6-1.1-12.1-1)

Review Criteria:

Each project is reviewed on its own merits, and the effect of each project on the revitalization of the surrounding areas and employment is considered. Basic eligibility is achieved through demonstrating the following:

- Creation of capital investment as an enhancement to the tax base
 1. Significantly increases full-time, permanent living-wage jobs¹;
 2. Significantly increases existing wages; or
 3. Creates affordable housing units.

In addition, other qualifying and evaluative criteria will be considered. The following page provides a general list of such criteria and their definitions. It is intended to be neither exhaustive nor definitive, and applicants are encouraged to submit proposals of projects that may not be found on this list but make a significant positive contribution to overall economic vitality and quality of life in the City of Bloomington.

Projects must be in accordance with the current City of Bloomington Unified Development Ordinance (UDO) and should be located within current areas of economic development focus.

¹ In accordance with Chapter 2.28 (Bloomington Living Wage Ordinance) of the City of Bloomington Municipal Code.

Additional Evaluative Criteria:

In addition to the creation of full-time, living wage employment, capital investment enhancements to the tax base, and the creation of affordable housing units, other evaluative criteria will be considered in the review of tax abatement applications, outlined below. This list is neither exhaustive nor definitive, and applicants are encouraged to submit proposals of projects that may not be found on this list but make a significant positive contribution to overall economic vitality and quality of life in the City of Bloomington.

Criteria	Definition
Quality of Life and Environmental/Sustainability	A project that is consistent with or advances principles found in the Sustainability Action Plan (2018), Climate Vulnerability and Risk Assessment (2020), or the Climate Action Plan (draft, 2020), and any other future sustainability planning documents; and/or a project which results in responsible sustainable development; and/or a project that results in environmental remediation or protection which makes a positive contribution to the overall quality of life within the City of Bloomington.
Affordable Housing	A project which is consistent with or advances principles found in the Community Housing Needs Assessment (2016), the City of Bloomington Comprehensive Plan (2018), Bloomington Housing Study (2020) and any other future planning documents related to affordable housing. Residential developments with a recorded restriction that requires the housing for a certain number of years to be rented or owned by qualified very low and low income households are considered affordable housing. Projects of this nature may be directed toward specified individuals, for example, first-time homebuyers and persons with disabilities.
Community Service	Volunteerism and civic engagement, such as serving on and working with boards, commissions and foundations, in the Bloomington community.
Community Character	A project that preserves and/or enhances the unique character of the city of Bloomington.

A list of examples for all criteria is provided in Appendix 1.

Ineligible Projects:

Facilities as listed in Indiana Code § 6-1.1-12.1-3 are ineligible. Some facilities which are generally prohibited under this law (such as retail or residential) may be eligible to apply under these General Standards for abatement if the area of the project is designated by the City Council as an Economic Development Target Area (EDTA), as allowed by I.C. § 6-1.1-12.1-7.

Other factors which may render a project ineligible for designation by the City of Bloomington include the following:

- A building permit has been obtained or construction has been initiated prior to final approval.
- The petitioner holds outstanding obligation or debt to the City which is in default or arrears, or is currently in litigation with the City.
- The project involves the demolition or removal of structures that are listed on the local Historic Register, that are eligible for individual listing on the National Historic Register or that are contributing structures within a nationally or locally designated historic district.
- The project requires major public infrastructure improvements at additional cost to the City of Bloomington.
- The project is not consistent with the City’s long-range plans for the area in question.

The City Council may void the tax abatement designation awarded to a project if the project has not been initiated within twelve (12) months of the date of the confirmatory resolution (final approval) of the tax abatement, or if the actual use is different than that approved.

Application Procedure and Review:

I.C. 6-1.1-12.1 requires an applicant to file a Statement of Benefits. The Economic Development Commission shall develop and implement, with the City of Bloomington Economic & Sustainable Development Department, application and Commission review procedures to ensure consistency with Indiana statutory requirements as set forth in I.C. § 6-1.1-12.1-1 and to fulfill the purpose of these General Standards.

Each application shall be reviewed by the Economic Development Commission and any other City commission as may be required by law. The Economic Development Commission shall make the final recommendation regarding designation to the City Council, based upon criteria in these General Standards and according to Indiana Code.

A non-refundable \$100.00 application fee shall be required for each application.

The Economic Development Commission’s recommendation shall be submitted to the City Council, along with all application and supplementary documents as necessary for the designating body’s review.

The City Council’s determination of whether the area shall be designated as an Economic Revitalization Area shall be based on procedures and the following findings as set forth in Indiana Code (I.C. 6-1.1-12.1):

- Whether the estimate of the value of the redevelopment or rehabilitation is reasonable for the projects of that nature.
- Whether the estimate of the number of individuals who will be employed or whose employment will be retained can be reasonably expected to result from the proposed described redevelopment or rehabilitation.
- Whether the estimate of the annual salaries of these individuals who will be employed or whose employment will be retained can be reasonably expected to result from the proposed described redevelopment or rehabilitation.
- Whether any other benefits about which information was requested are benefits that can be reasonably expected to result from the proposed described redevelopment or rehabilitation.
- Whether the totality of the benefits is sufficient to justify the deduction.

If the City Council makes the above findings in the affirmative, it shall pass a declaratory resolution to designate an area an Economic Revitalization Area, approve a Statement of Benefits and authorize the term of abatement.

If the Council recommends designation of an ERA and approval thereof, the City Clerk shall:

- A. Certify a copy of the resolution and the application to the Monroe County Assessor and Auditor’s Office;
- B. Publish a legal notice to inform interested parties that the tax abatement application is available for inspection at the Assessor’s Office;
- C. Set a meeting date, at which time the Common Council shall hear all remonstrance and objections to the area being designated an “Economic Revitalization Area”.

The Common Council shall subsequently hold a regular meeting and vote on a resolution confirming, modifying, or rescinding the earlier resolution recommending designation and approval.

Memorandum of Agreement:

Upon approval by the Common Council of a confirmatory resolution:

- A. The applicant will sign a Memorandum of Agreement with the City of Bloomington, thereby agreeing to all terms set forth by the Common Council approval and as required by the City of Bloomington.
- B. The City Clerk shall certify a copy of the confirming resolution and the application to the Applicant, the Monroe County Assessor and Auditor’s Office.

Compliance Procedures and Annual Review:

The Department of Economic & Sustainable Development will compile a yearly compliance report related to all active tax abatement projects to present to the Economic Development Commission. The Commission will forward the report to the City Council. The report will be based upon Compliance with Statement of Benefits Forms (CF-1s) as submitted by property owners receiving tax abatement. The annual compliance process for the property owner is set forth in I.C. § 6-1.1-12.1-5.1 and additional terms may be set forth in the Memorandum of Agreement.

If the CF-1 is not filed, the benefits promised are not materialized, or other terms of the Memorandum of Agreement are not fulfilled, the Council may find the property owner not in Substantial Compliance as described below, and may act to rescind the remaining term of abatement, or enforce similar penalties as set forth in the Memorandum of Agreement.

Substantial Compliance Requirements:

In addition to terms set forth in I.C. § 6-1.1-12.1-5.9, the Memorandum of Agreement may set forth additional terms related to what may constitute substantial compliance or noncompliance.

Noncompliance occurs when the designating bodies (Economic Development Commission and City Council) determine that the property owner has not made reasonable efforts to comply with the Statement of Benefits. Noncompliance may not result from factors beyond the control of the property owner, such as declining demand for the owner's products or services. If factors beyond the property owner's control do not cause noncompliance, the termination of deduction procedure will be implemented as prescribed by I.C. § 6-1.1-42-30.

Factors within the control of the property owner that may contribute to noncompliance may include, but are not limited to, the following:

- Failure to comply with any terms set forth in the Memorandum of Agreement;
- An incomplete, inaccurate, or missing CF-1;
- Petitioner vacates the city of Bloomington during the term of abatement;
- Fraud on the part of petitioner;
- Initiation of litigation with the City of Bloomington.

The City Council may void the tax abatement designation awarded to a project if the project has not been initiated within twelve (12) months of the date of the confirmatory resolution (final approval) of the tax abatement, or if the actual use is different than that approved.

Appendix 1: Project Eligibility Criteria Examples

The following is a list of general examples. It is not intended to be exhaustive nor definitive. The Department of Economic and Sustainable Development will assist potential applicants with understanding project eligibility on a case-by-case basis.

-- Job creation

- Full-time, living-wage jobs are created for Bloomington residents – from new business or expansion of existing employee base
- Compensation may include wages and benefits such as childcare.

-- Creation of capital investment as enhancement to the tax base

- Projects that provide a major private infrastructure improvement paid by the developer
- Includes real property investment – new and existing buildings
- Includes eligible manufacturing and other eligible equipment

-- Quality of Life and Environmental/Sustainability

- Urban infill redevelopment and/or brownfield remediation²
- Green building according to “Leadership in Energy and Environmental Design” (LEED)³ or other commonly accepted green building standards
- A business engaged in research and development of alternative energy production or other methods to build community resilience in a volatile energy market
- A social enterprise or business helping formerly incarcerated persons re-enter the workforce
- A business specializing in fine arts/crafts (bolstering the arts sector and assisting with diversifying the local economy).

-- Affordable Housing

- A housing development sets aside 50% of the units to be affordable (at, e.g., HUD Fair Market rent) for low income to moderate income individuals
- Housing units for workforce housing
- Housing stipulated for sale to first-time homebuyers
- Affordable housing with handicap-accessible units, and/or the units are designed for occupancy by senior citizens.

-- Community Service

- Volunteering labor, materials, money, or a combination of the three to charitable organizations and non-profit agencies that make a significant impact in Bloomington.
- Serving on boards, commissions, and/or foundations whose mission involves community service and the betterment of Bloomington.

-- Community Character

- Art space and art studio expansion and development
- Petitioner is a local home-grown business, headquartered in and/or unique to Bloomington
- Rehabilitation, preservation, and renovation of historic properties according to Secretary of the Interior Standards in consultation with the City Historic Preservation Officer.

² 1 By definition, a brownfield site is real property, the expansion, redevelopment, or reuse of which may be complicated by the presence or potential presence of a hazardous substance, pollutant, or contaminant. 42 U.S.C. §9601(39) (Public Law 107-118 (H.R. 2869) – “Small Business Liability Relief and Brownfields Revitalization act” – signed into law Jan. 11, 2002).

³ www.usgbc.org

Appendix 2:

Excerpt from IC 6-1.1-12.1-5.9: Determination of substantial compliance with statement of benefits; notice of noncompliance; hearing; resolution; appeal

- (a) This section does not apply to a deduction under section 3 of this chapter for property located in a residentially distressed area; or
- (b) Not later than forty-five (45) days after receipt of the information described in section 5.1, 5.3(j), or 5.6 of this chapter, the designating body may determine whether the property owner has substantially complied with the statement of benefits approved under section 3, 4.5, or 4.8 of this chapter. If the designating body determines that the property owner has not substantially complied with the statement of benefits and that the failure to substantially comply was not caused by factors beyond the control of the property owner (such as declines in demand for the property owner's products or services), the designating body shall mail a written notice to the property owner. The written notice must include the following provisions:
 - (1) An explanation of the reasons for the designating body's determination.
 - (2) The date, time, and place of a hearing to be conducted by the designating body for the purpose of further considering the property owner's compliance with the statement of benefits. The date of the hearing may not be more than thirty (30) days after the date on which the notice is mailed.
- (c) On the date specified in the notice described in subsection (b)(2), the designating body shall conduct a hearing for the purpose of further considering the property owner's compliance with the statement of benefits. Based on the information presented at the hearing by the property owner and other interested parties, the designating body shall again determine whether the property owner has made reasonable efforts to substantially comply with the statement of benefits and whether any failure to substantially comply was caused by factors beyond the control of the property owner. If the designating body determines that the property owner has not made reasonable efforts to comply with the statement of benefits, the designating body shall adopt a resolution terminating the property owner's deduction under section 3, 4.5, or 4.8 of this chapter. If the designating body adopts such a resolution, the deduction does not apply to the next installment of property taxes owed by the property owner or to any subsequent installment of property taxes.
- (d) If the designating body adopts a resolution terminating a deduction under subsection (c), the designating body shall immediately mail a certified copy of the resolution to:
 - (1) the property owner;
 - (2) the county auditor; and (3) the county assessor.The county auditor shall remove the deduction from the tax duplicate and shall notify the county treasurer of the termination of the deduction. If the designating body's resolution is adopted after the county treasurer has mailed the statement required by IC 6-1.1-22-8.1, the county treasurer shall immediately mail the property owner a revised statement that reflects the termination of the deduction.
- (e) A property owner whose deduction is terminated by the designating body under this section may appeal the designating body's decision by filing a complaint in the office of the clerk of the circuit or superior court together with a bond conditioned to pay the costs of the appeal if the appeal is determined against the property owner. An appeal under this subsection shall be promptly heard by the court without a jury and determined within thirty (30) days after the time of the filing of the appeal. The court shall hear evidence on the appeal and may confirm the action of the designating body or sustain the appeal. The judgment of the court is final and conclusive unless an appeal is taken as in other civil actions.
- (f) If an appeal under subsection (e) is pending, the taxes resulting from the termination of the deduction are not due until after the appeal is finally adjudicated and the termination of the deduction is finally determined.

As added by P.L.14-1991, SEC.6. Amended by P.L.90-2002, SEC.124; P.L.256-2003, SEC.7; P.L.1932005, SEC.5; P.L.154-2006, SEC.30; P.L.3-2008, SEC.37; P.L.146-2008, SEC.128; P.L.288-2013, SEC.17, eff. July 1, 2013.

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