

**Bloomington Urban Enterprise Association
Board Meeting
April 8, 2020**

Join Zoom Meeting

<https://zoom.us/j/315858258?pwd=V3hmd0ErSFRvMlF5UHZoQkpOSmpHdz09>

Meeting ID: 315 858 258

Password: 831317

I. Roll Call

II. Approval of Minutes

- February 12, 2020 Minutes

III. Reports from Officers and Committees

- Director's Report
- Financial Report / process review

IV. New Business

- New attendees
 - i. Scot Wright
 - ii. Tracy Gates
 - iii. Marnina Patrick
- COVID 19 Funding Request—Bloomington Rapid Response Fund
- 2020 EZID mailings
- Façade grant request—213 S Rogers St

V. Unfinished Business

- Cook Center/SBDC funding vote
- Revision to Bylaws

VI. General Discussion

VII. Adjournment

Next BUEA Meeting will be on Wednesday, May 13, 2020 at 12 PM

**Bloomington Urban Enterprise Association
Board Meeting Minutes
City Hall, McCloskey Room - 401 N. Morton St.
February 12, 2020**

Roll Call

Members Present: Paul Ash, Julie Donham, Jackie Yenna, Jane Kupersmith, Karin St. John, Kate Rosenbarger, Alex Crowley, Margaret Fette

City Staff Present: Kevin Curan, Larry Allen

Guests: Jordan Morang

I. Approval of Minutes - January 08, 2019

Paul motioned to approve the minutes with a typo changed, Jackie seconded the motion. The motion was approved unanimously.

II. Reports from Officers and Committees

- Director's Report
 - i. Jane suggested that the Directors Report will essentially all be under New Business and moved on to the financial report.
- Financial Report

There was no payments from January. Jane explained that there would be more action in February.

Jane went over the 2020 proposed budget. She said that the changes included Professional Bonds which would be lowered as she just received the bills. The \$250 for Postage was for a specific mailing campaign to get Zone businesses more aware of the BUEA. The professional bonds were decreased because bill came in and there was no longer a need to estimate.

Jane explained that the advertisement for the bus wrap was built into the budgeted School Grants part of the MCCSC project grant. Julie said that there would be a presentation by MCCSC for that money. Julie asked if the Strategic Communication Professional was the line where Rachel's professional communication services were used. Jane said that it was and that the \$5,000 in the Advertising/Marketing should be kept there for future opportunities. Jane said that she and Jordan hope to be able to disperse the \$6,000 Resident Scholarship money and that the \$2,500 Lemonade Day line had been authorized by the Board via email vote.

Jane said that Steve from SBDC/Cook Center would likely come in March to discuss the \$30,000 that was budgeted for the SBDC/Cook Center. Jane said that this discussion with the board would likely happen at the next meeting. The \$10,000 for Unbudgeted Grants was there for items that are not on the 2020 budget but that the BUEA does want to fund. Jane said the Historic Façade Grants is down to \$30,000 because it has been underutilized in the recent past. She mentioned that she had talked to Conor Herterich, the Historic Preservation Program Manager,

about taking another look at it and creating a more formalized process. She hopes to get all \$30,000 granted and then be able to increase the Façade Grants to its original amount in the coming years.

Karin asked what the professional services were. She then asked that there was an increase in the contract to 40,000 from the 35,000 in the 2020 budget. Jane said that the board should discuss this in the New Business section.

III. New Business

- 2020 Budget Discussion

Jane asked Larry if he would be willing to give the board an introduction into what the contract has been in the past and some other background.

Larry discussed the background to this line item. He said that in the past the contract was done in three year terms and that the last had been done in 2015 at \$35,000 a year. He said that there should have been a 5% increase year to year from 2015 to 2020. Had this been enacted, the contract would be at around \$45,000 for the 2020 year. An internal discussion was had and they came to the conclusion that \$45,000 would be a little unfair. The 40,000 is reflective of the increase that should have been paid at the end of the last three year agreement (ended at the end of 2017). The contract will also shift from a 3 year contract to a 1 year agreement. This is to ensure that the BUEA Board and the City are happy with the agreement.

Jane stated that she is working with Kevin to get the balance sheets and advance the financial reporting. Julie asked if Kevin knew the timing when the Board would be able to receive this data. Kevin and Jane will sit down to discuss what is appropriate to generate and disperse to the board. Jane said that she would like the monthly meetings to include the balance sheet in the financial discussion. Jane said that she is working to get “view-only” logins for the officers to be able to get into QuickBooks. Kevin said that he is learning QuickBooks and is waiting on Jeff Underwood to get back from surgery to be able to get all the information that Jane is requesting.

Julie asking if the financial agreement should be voted on. Jane suggested that there should be a vote at the next meeting on this and in the mean time she would get the balance sheet and other financial data.

Larry said that under the past agreement with the City the signatories for the BUEA had to be bonded. He suggested that Jane take this extra time to address this issue as well. Larry said that he just wanted to make sure that the board understood that the new signatory would have to go through that bonding process. Margaret and Julie both suggested that they do not remember being bonded or signing anything of that sort. Alex said that the City would look into it.

Karin asked if there was currently an agreement in place with the city for the services. Larry said that there wasn't but the future agreement could be applied retroactively to ensure that both parties were covered. Larry asked that any questions or comments that do come up about the agreement between the City and the BUEA be emailed to him so he can address them before the vote.

Karin asked if the BUEA had been using QuickBooks. Kevin said that it had and that there should be data from the past in QuickBooks that could be accessed. Karin said that they would likely want the monthly report with the year to date, income statement, and balance sheet. She also said that it would be beneficial to see the 12.31.2019 statement as well.

Jane suggested that the finances could be earning more interests. She said that this would be a mid-range goal so that the money in the banks in making the most interest that it could be.

Julie said that she would be fine with amending the Professional Services line item of the budget for 2020.

Paul motioned to approve the 2020 budget as amended. Jackie seconded the motion. The motion passed unanimously.

- Recruitment for the BUEA

Jordan explained the creation of the business database. This database had been used to send out emails and Facebook messages alerting the businesses to potential grants or abatements they may be eligible for. Jane said that the emails that were sent out have gotten a lot of feedback. The goal of this was to get the BUEA name out there and potentially bring in more EZID earnings. Jane said that large projects that would be eligible for an EZID but also within the TIF district are unlikely going to be paid to the BUEA but rather go into the TIF. Jane explained that TIF trumps EZID almost every time. She went on to explain the retroactive possibility of the EZID with other businesses. Jane explains that, in the past, EZIDs have been somewhat passive. She hopes that there will be more as she and Jordan begin to pound the pavement. Julie said that she appreciates this as the BUEA will have a big income drop off in the next few years. Margaret asked about the reasoning for the denial of the Kroeger project. Jane explained that she would find out why this was denied, but was likely because of the TIF project.

Julie asked where the TIF district was. Larry explained that the TIF impacts much of the Zone. Jane said that she would get the TIF map and the Zone map to the board members.

Jane said that a lot of the non-profits within the Zone employ Zone resident and were in the dark about receiving credits for that. The outreach campaign was also an attempt to get more of these organizations the abatements that they could qualify for.

Karin pointed to the chart displaying the future revenue projections and stated that it was likely to drop about 50% in the next few years if there weren't a large increase in EZIDs. With this knowledge the board should think about the ability to fund larger project in the future. Alex said that the board may also want to consider how to shift the expenses in the future as well. Jane said that the movement and dissemination of information about potential EZIDs could positively impact the revenue stream a few years down the road.

Larry suggested that the board should talk to Council about what their priorities were for tax abatements. This would hopefully eliminate an additional hurdle if there were a potential EZID project within the TIF. Alex went on to explain that either the additional revenue comes to the

TIF or to the BUEA. Larry stated that there is a limit on the retroactivity that could be applied to a potential EZID project.

Larry explained that the Council has made it a precedent that they are unlikely to approve an EZID that is within a TIF. There was further discussion about how the BUEA should approach EZIDs when they would need approval by Council.

All agreed that it was important to meet with Council and discuss the merits of the BUEA and EZIDs. Karin said that it comes down to ensuring that the businesses which are making improvements can be approved for EZIDs.

Alex said that the future of the BUEA should continue to be discussed. It is important to keep in mind that the money can be fully dispersed and the BUEA run its course.

- Housing maintenance/repair support

Jane said that Ihsan would be taking on this project. Jane also said that HAND may be able to play a part in this as well. She said that Conor suggested that the Façade grant be expanded to residential properties as well. Further discussion on the possibilities of expanding the Façade grant will be had in the future.

IV. Unfinished Business

- Lemonade Day vote authorization follow up

Jane said that the Lemonade Day folks send their thanks. Jane is working on the Lemonade Day advertisement.

Julie stated for the record that the board voted via proxy to approve the \$2,500 expenditure for Lemonade Day.

V. General Discussion

It was decided that the next meeting would be March 18th, 2020.

VI. Adjournment

The meeting was adjourned at 1:05 PM

Next BUEA Meeting will be on Wednesday March 11, 2020 at 12 PM

Bloomington Urban Enterprise Association Balance Sheet Prev Year Comparison

04/06/20

As of December 31, 2019

Accrual Basis

	Dec 31, 19	Dec 31, 18
ASSETS		
Current Assets		
Checking/Savings		
Cash & Cash Equivalents		
First Financial Bank		
FFB - Checking	-1,962.85	-36,553.91
FFB - Money Market	290,104.95	289,672.53
FFB - Savings	1,308,541.73	1,691,402.97
Total First Financial Bank	1,596,683.83	1,944,521.59
German American Bank	212,980.39	211,354.20
IU Credit Union	202,726.76	202,119.57
Peoples State Bank	102,748.27	101,853.78
Total Cash & Cash Equivalents	2,115,139.25	2,459,849.14
Total Checking/Savings	2,115,139.25	2,459,849.14
Accounts Receivable		
Accounts Receivable	36,751.50	36,751.50
Total Accounts Receivable	36,751.50	36,751.50
Total Current Assets	2,151,890.75	2,496,600.64
Other Assets		
Notes Receivable - Long Term		
Gul M. Saeedi	0.00	863.95
Harmony School - Rhino's	0.00	50,000.00
Michael's Uptown Cafe	11,805.45	13,472.13
My Fin, The Tap	13,824.08	15,326.25
Project School	-893.64	1,606.32
The Owlery LLC	10,619.04	11,718.76
Topoligus Investments	15,972.15	15,972.15
Notes Receivable - Long Term - Other	-222.43	0.00
Total Notes Receivable - Long Term	51,104.65	108,959.56
Total Other Assets	51,104.65	108,959.56
TOTAL ASSETS	2,202,995.40	2,605,560.20
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Accounts Payable		
Accounts Payable	19,279.95	19,279.95
Total Accounts Payable	19,279.95	19,279.95
Total Current Liabilities	19,279.95	19,279.95
Total Liabilities	19,279.95	19,279.95
Equity		
Opening Balance Equity	1,565,019.23	1,565,019.23
Unrestricted Net Assets	1,021,261.02	657,518.50
Net Income	-402,564.80	363,742.52
Total Equity	2,183,715.45	2,586,280.25
TOTAL LIABILITIES & EQUITY	2,202,995.40	2,605,560.20

Bloomington Urban Enterprise Association Balance Sheet Prev Year Comparison

04/06/20

Accrual Basis

As of December 31, 2019

	\$ Change	% Change
ASSETS		
Current Assets		
Checking/Savings		
Cash & Cash Equivalents		
First Financial Bank		
FFB - Checking	34,591.06	94.6%
FFB - Money Market	432.42	0.2%
FFB - Savings	-382,861.24	-22.6%
Total First Financial Bank	-347,837.76	-17.9%
German American Bank	1,626.19	0.8%
IU Credit Union	607.19	0.3%
Peoples State Bank	894.49	0.9%
Total Cash & Cash Equivalents	-344,709.89	-14.0%
Total Checking/Savings	-344,709.89	-14.0%
Accounts Receivable		
Accounts Receivable	0.00	0.0%
Total Accounts Receivable	0.00	0.0%
Total Current Assets	-344,709.89	-13.8%
Other Assets		
Notes Receivable - Long Term		
Gul M. Saeedi	-863.95	-100.0%
Harmony School - Rhino's	-50,000.00	-100.0%
Michael's Uptown Cafe	-1,666.68	-12.4%
My Fin, The Tap	-1,502.17	-9.8%
Project School	-2,499.96	-155.6%
The Owlery LLC	-1,099.72	-9.4%
Topoligus Investments	0.00	0.0%
Notes Receivable - Long Term - Other	-222.43	-100.0%
Total Notes Receivable - Long Term	-57,854.91	-53.1%
Total Other Assets	-57,854.91	-53.1%
TOTAL ASSETS	-402,564.80	-15.5%
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Accounts Payable		
Accounts Payable	0.00	0.0%
Total Accounts Payable	0.00	0.0%
Total Current Liabilities	0.00	0.0%
Total Liabilities	0.00	0.0%
Equity		
Opening Balance Equity	0.00	0.0%
Unrestricted Net Assets	363,742.52	55.3%
Net Income	-766,307.32	-210.7%
Total Equity	-402,564.80	-15.6%
TOTAL LIABILITIES & EQUITY	-402,564.80	-15.5%

Bloomington Urban Enterprise Association
Balance Sheet Prev Year Comparison
As of March 31, 2020

04/06/20

Accrual Basis

	Mar 31, 20	Mar 31, 19
ASSETS		
Current Assets		
Checking/Savings		
Cash & Cash Equivalents		
First Financial Bank		
FFB - Checking	67,574.31	-6,469.45
FFB - Money Market	290,176.29	289,777.30
FFB - Savings	1,235,195.84	1,691,951.65
Total First Financial Bank	1,592,946.44	1,975,259.50
German American Bank	213,288.01	211,745.31
IU Credit Union	202,726.76	202,269.12
Peoples State Bank	102,994.59	102,020.79
Total Cash & Cash Equivalents	2,111,955.80	2,491,294.72
Total Checking/Savings	2,111,955.80	2,491,294.72
Accounts Receivable		
Accounts Receivable	36,751.50	36,751.50
Total Accounts Receivable	36,751.50	36,751.50
Total Current Assets	2,148,707.30	2,528,046.22
Other Assets		
Notes Receivable - Long Term		
Michael's Uptown Cafe	11,666.56	13,055.46
My Fin, The Tap	13,547.62	14,919.63
Project School	-893.64	773.00
The Owlery LLC	10,619.04	11,500.46
Topolgus Investments	15,972.15	15,972.15
Notes Receivable - Long Term - Other	-472.85	0.00
Total Notes Receivable - Long Term	50,438.88	56,220.70
Total Other Assets	50,438.88	56,220.70
TOTAL ASSETS	2,199,146.18	2,584,266.92
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Accounts Payable		
Accounts Payable	19,279.95	19,279.95
Total Accounts Payable	19,279.95	19,279.95
Total Current Liabilities	19,279.95	19,279.95
Total Liabilities	19,279.95	19,279.95
Equity		
Opening Balance Equity	1,565,019.23	1,565,019.23
Unrestricted Net Assets	618,696.22	1,021,261.02
Net Income	-3,849.22	-21,293.28
Total Equity	2,179,866.23	2,564,986.97
TOTAL LIABILITIES & EQUITY	2,199,146.18	2,584,266.92

Bloomington Urban Enterprise Association
Balance Sheet Prev Year Comparison
As of March 31, 2020

	\$ Change	% Change
ASSETS		
Current Assets		
Checking/Savings		
Cash & Cash Equivalents		
First Financial Bank		
FFB - Checking	74,043.76	1,144.5%
FFB - Money Market	398.99	0.1%
FFB - Savings	-456,755.81	-27.0%
Total First Financial Bank	-382,313.06	-19.4%
German American Bank	1,542.70	0.7%
IU Credit Union	457.64	0.2%
Peoples State Bank	973.80	1.0%
Total Cash & Cash Equivalents	-379,338.92	-15.2%
Total Checking/Savings	-379,338.92	-15.2%
Accounts Receivable		
Accounts Receivable	0.00	0.0%
Total Accounts Receivable	0.00	0.0%
Total Current Assets	-379,338.92	-15.0%
Other Assets		
Notes Receivable - Long Term		
Michael's Uptown Cafe	-1,388.90	-10.6%
My Fin, The Tap	-1,372.01	-9.2%
Project School	-1,666.64	-215.6%
The Owlery LLC	-881.42	-7.7%
Topolgus Investments	0.00	0.0%
Notes Receivable - Long Term - Other	-472.85	-100.0%
Total Notes Receivable - Long Term	-5,781.82	-10.3%
Total Other Assets	-5,781.82	-10.3%
TOTAL ASSETS	-385,120.74	-14.9%
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Accounts Payable		
Accounts Payable	0.00	0.0%
Total Accounts Payable	0.00	0.0%
Total Current Liabilities	0.00	0.0%
Total Liabilities	0.00	0.0%
Equity		
Opening Balance Equity	0.00	0.0%
Unrestricted Net Assets	-402,564.80	-39.4%
Net Income	17,444.06	81.9%
Total Equity	-385,120.74	-15.0%
TOTAL LIABILITIES & EQUITY	-385,120.74	-14.9%

Bloomington Urban Enterprise Association

Profit & Loss YTD Comparison

04/06/20

March 31 through December 31, 2019

Accrual Basis

	Mar 31 - Dec 31, 19	Jan - Dec 19
Ordinary Income/Expense		
Income		
Business Zone Loan Interest	381.35	705.26
Zone Membership Fees	731,453.79	731,453.79
Total Income	731,835.14	732,159.05
Expense		
Advertising and Promotion	5,000.00	5,000.00
Dues & Subscriptions	16,152.00	16,152.00
Grants		
Arts Grants	27,215.40	34,626.94
Facade Grants	0.00	10,000.00
School Grants	33,360.00	33,360.00
Total Grants	60,575.40	77,986.94
Insurance Expense	0.00	2,150.00
Office Supplies	0.00	22.00
Professional Fees		
Accounting	2,000.00	2,000.00
Total Professional Fees	2,000.00	2,000.00
Professional Services		
Ivy Tech	16,000.00	16,000.00
SBDC	14,000.00	14,000.00
Total Professional Services	30,000.00	30,000.00
Scholarships		
Business Scholarships	1,540.00	2,088.00
Resident Scholarships	1,200.00	1,200.00
Total Scholarships	2,740.00	3,288.00
Special Projects		
Lemonade Day	0.00	2,500.00
Special Projects - Other	1,000,000.00	1,000,000.00
Total Special Projects	1,000,000.00	1,002,500.00
Total Expense	1,116,467.40	1,139,098.94
Net Ordinary Income	-384,632.26	-406,939.89
Other Income/Expense		
Other Income		
Interest Income	3,641.35	4,375.09
Total Other Income	3,641.35	4,375.09
Net Other Income	3,641.35	4,375.09
Net Income	-380,990.91	-402,564.80



MEMORANDUM

To: BUEA Board
CC: Sean Starowitz, Larry Allen, Jeff Underwood
From: Jane Kupersmith, Executive Director
Date: 04/06/2020
Re: COVID-19 Rapid Response Fund

Dear BUEA Board Members,

Many of you may already know that the City of Bloomington's Department of Economic and Sustainable Development is part of the Economic Stabilization & Recovery (ES&R) Working Group, which is tasked with, among other things, developing a system and strategy for deploying Food and Beverage tax funds, \$2 million of which are expected to be approved for dispersal by the Common Council this week.

Because of the limitations of these funds, which must be used only by tourism-related businesses, and because of the severity and likely duration of the economic impact of COVID-19, the ES&R Working Group would also like to request a contribution from the BUEA in the amount of \$500,000 to be used as follows:

Operational Support for ES&R Administration	\$12,500
Emergency Operational Support Art Grant	\$112,500
Micro-Loan Program for Entities not covered by F&B	\$350,000
<u>Emergency Economic Independence Scholarships</u>	<u>\$25,000</u>
	\$500,000

The Emergency Operational Support Art Grant is in addition to the 2020 BUEA Zone Arts Grant, which we would also like to recommend be used for operational rather than programming expenses. Arts funding comes largely from endowments, which will plummet in 2021, and therefore we recommend that these grant funds be applicable in either 2020 or 2021. We would like to request these funds in addition to the 2021 Zone Arts Grant Program, which will support programming.

The ES&R Working Group developed the Rapid Response loan program as a way to get Food and Beverage tax funds to tourism-related businesses in a short amount of time. The goal of the BUEA

Micro-Loan Program is to complement the Rapid Response Loan Program by supporting a wider range of businesses within the Enterprise Zone. The outlined (but not finalized) terms follow. ESRWG suggests the BUEA micro-loans follow the same terms and process.

Proposed RRF Loan Terms

- Loan amounts up to \$50,000
- Low interest rate, no application, origination, or packaging fees
- No minimum credit score is required, and for immigrant entrepreneurs, ITIN is accepted in place of SSN
- Optional deferred payback: 6 months, no prepayment penalties
- Term of the loan at discretion of RRF Advisory Commission, but no greater than 36 months
- Borrowers must be able to demonstrate an ability to pay back the loan within the term of the loan
- Borrowers must certify that funds will go to support wages, payroll costs, rent or utilities, and/or other immediate, essential expenses. Funds may not be distributed to equity investors or owners, unless the owner is a primary employee of the business or the sole proprietor
- Nonprofit organizations may be considered for available loan forgiveness through the Rapid Response Fund.
- Loans may require personal guarantee from borrower.

The **Increased Economic Independence Scholarship** addresses an anticipated job-training need as a result of the current major economic shift. We recommend that these additional funds be allowed for use during 2020 and 2021, and that they are in addition to the currently allotted \$6k. We would additionally like the BUEA to consider making them grants rather than reimbursements.

I look forward to meeting on Wednesday and hope that this context allows for a robust discussion of these programs.

Wishing you all good health,

Jane

Historic Façade Grant Program Application

The information collected below will be used to determine whether the project qualifies for funding by the Bloomington Urban Enterprise Association. All information will be kept confidential.

Applicant Information:	
Applicant (include the names of all partners): <u>Bellwether Properties, LLC</u>	Phone: <u>(812) 822-3601</u>
Applicant Address (include Zip Code): <u>1499 W. Bloomfield Rd Bloomington, IN 47403</u>	
Address of the Property to be renovated (include Zip Code): <u>213 S. Rogers Bloomington, IN 47401</u>	
Ownership: Individual Partnership <u>Corporation</u> (Specify: <u>LLC</u>) Non-Profit Organization Association (Specify: _____)	
Federal ID No.: <u>47-3707723</u>	
Year of incorporation: <u>2004</u> Length of time at this location: <u>5 yrs</u>	
Contact Person: <u>Ben Swanson</u> Tel: <u>(812) 822-3601</u>	
Please give a brief description of your business/organization: <u>We are a music business that markets + distributes our artists albums + compositions throughout the world.</u>	
Have you participated in any Zone tax incentives? Yes <input type="radio"/> No <input checked="" type="radio"/>	
If so, which ones?	
Requested amount of BUEA funds \$ <u>6,650</u> <u>(50% of budget)</u>	
Project Description: <u>We would like help restoring the limestone facade to be more in line with the original design. We'd like to remove the non-historic awning, tuck point and repair the limestone + paint the entryway.</u>	

*Please include drawings or photographs illustrating proposed changes to the façade.

Economic Impact:

Total number of jobs at location: 40+ Number of new jobs added from project: 0

Are the new jobs: FT (#) PT (#)

Average management/professional staff wage: \$35k Average service staff wage: N/a

Average wage for new jobs: N/a

Do these new jobs have benefits: Yes No

Please describe:

Please estimate how BUEA funds will be spent: Total Façade Cost: \$ <u>13,300</u> BUEA Funds Requested: \$ <u>6,650</u> Project Balance: \$ <u>6,650</u> Source for Funding: <u>Cash</u> Loan: \$ <u> </u> Cash: \$ <u>6,650</u> Site improvements: \$ <u> </u> Other (describe): \$ <u> </u>	Do you have clear title to the property? <input checked="" type="radio"/> Yes <input type="radio"/> No
	Total Estimated Cost of Overall Project: <u>12,000.00</u>
	Estimated construction start date: <u>March 1, 2020</u>
	Estimated construction completion date: <u>March 30, 2020</u>
	Do you have access to an older or archival photograph of the building? Yes <input checked="" type="radio"/> No

Have you discussed this project with the City Planning Department? If yes, please attach copy of approval letter. If no, please specify date of meeting.

Yes No Meeting date: 2/13/2020 Message saying Planning wasn't needed

Is this property historically eligible?
 Yes No

Have you hired a contractor?
 Yes No If yes, who? Restoration Masonry Address: 3293 Carowinds Ct. Bloomington IN 47408

Will the contractor or subcontractors be Zone businesses?
Yes No If yes, list:

Have you contacted and worked with the HAND Historic Preservation Program Manager in order to produce an appropriate restoration/rehabilitation plan for the façade?
 Yes No

Have you received funding for façade rendering through the Historic Preservation Commission?

Yes No

The following must be included for submission:

- Completed application with signatures and dated
- Copy of Deed to property, if applicable
- Offer to Purchase, if applicable
- Exterior drawing or rendering of proposed work
- Project specifications/work write up with estimates
- Zoning compliance/approval letter, if applicable
- Pro Forma Operating Budget
- Project Timeline

I hereby certify that the information provided in this application and supporting documentation is given for the purposes of obtaining financial assistance from the Bloomington Urban Enterprise Association (BUEA) and is true and complete to the best of my knowledge.



Applicant

1-28-2020

Date

Applicant

Date

Restoration & Design Concepts

RESTORATION MASONRY

Paul Chambers
3293 Carowinds Court
Bloomington, IN 47401

Phone: (812) 361-0083
Email: pachambers3@gmail.com

Estimate

Attention Jayne York

Job Information

Contractor: Restoration & Design

Job# _____

Projected Completion Date _____

Date	Qty	Description	Amount	Total
11/10/19		213 S. Rogers Building /Limestone Restoration		
	1	The pressure washing should be done first to take any loose mortar or loose limestone off the façade. Approximately 1600 sq.ft. @ \$1.00pr.ft. <i>This pressure washing will need to be done at the end of the repairs as well.</i>	\$3,200.	
	2	There are 9 pieces of stone to be replaced. 12" tall x 29" to 13"long	\$2,500.	
	3	Removing the steel awning 44'x 6' and disposal	\$1,325.	
	4	Remove and fill the bolt holes and 12 other screw holes with a 2part epoxy to match limestone.	\$2,245.	
	5	All mortar joints will match in color and texture. Mortar, sand and epoxy	\$785.	
	6	Approximately 35ft of damaged mortar joint repair	\$1,275.	
		TOTAL		\$11,330.
		NOTE: The sidewalk will need to be totally closed off during the awning removal. The sidewalk will be restricted to smaller walkway during the rest of the restoration project.		
		NOTE 2: There is more damaged mortar joints existing then the report acknowledged. These repairs are \$65.pr.ft.		

Note: A 50% deposit is required prior to delivery of goods and services.

The final cost may differ slightly from the estimate but will not exceed \$12,000.

Please make checks payable to Paul Chambers

Thanks For Your Business

Contractors Invoice

WORK PERFORMED AT:

Springpoint Architects

TO:

David Gammon painting

DATE

YOUR WORK ORDER NO.

OUR BID NO.

DESCRIPTION OF WORK PERFORMED

Front Entry of 213 S. Rogers

2 Coats

Ceiling - \$90

2 gallons - \$140

walls - \$60

2 gallons - \$140

Doors & Transom - \$90

1 gallon - \$70

Trim including column - \$90

1 gallon - \$70

Prep (includes any cleaning, sanding, patching or caulking) \$30

Labor: \$360

Supplies: \$420

Total: \$780

All Material is guaranteed to be as specified, and the above work was performed in accordance with the drawings and specifications provided for the above work and was completed in a substantial workmanlike manner for the agreed sum of _____

Dollars (\$ _____).

This is a Partial Full invoice due and payable by: _____
Month Day Year

in accordance with our Agreement Proposal No. _____ Dated _____
Month Day Year

OPERATING BUDGET:

\$780	Painting
\$11,330	Limestone restoration/awning removal

\$12,100	Sub-total
\$1,210	10% Contigency

\$13,300	TOTAL BUDGET

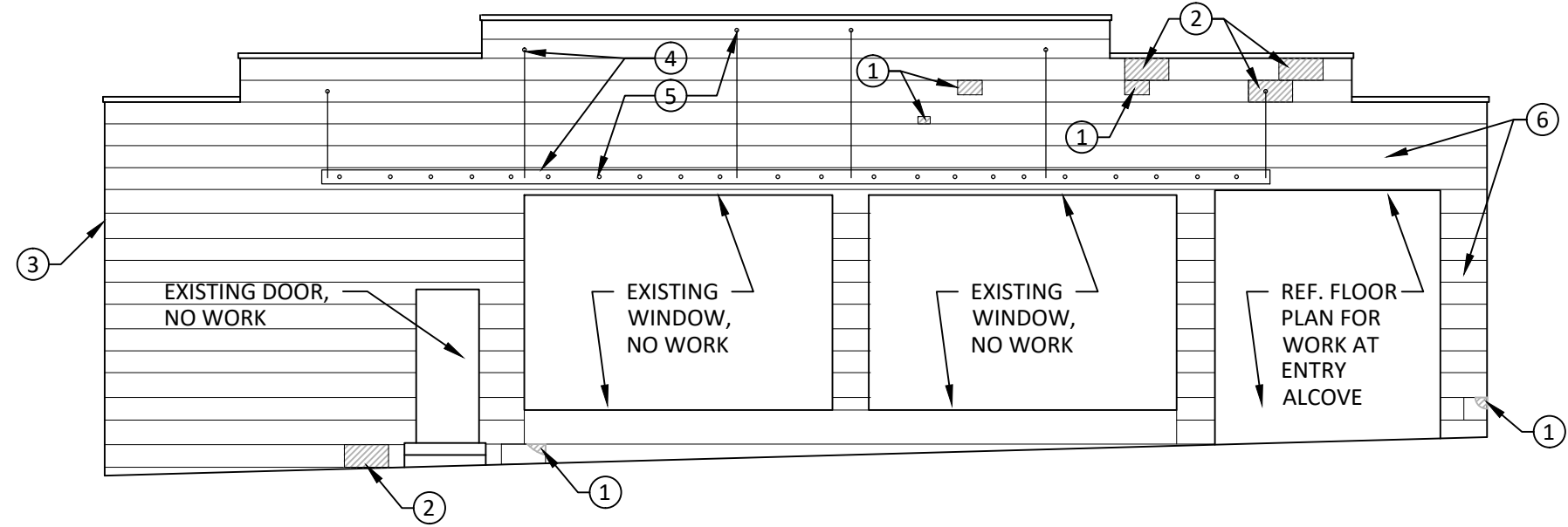
TIMELINE:

March 1st	Construction Start Date
March 30th	Construction End Date

ELEVATION NOTES:

CLEAN ALL LIMESTONE AT WEST FACADE, INCLUDING AT RETURNS ON SOUTH AND NORTH FACADES, REF. ATTACHED SPECIFICATION

- ① REPAIR PARTIALLY HATCHED STONES
- ② REPLACE HATCHED STONES
- ③ REPOINT JOINTS WHERE LIMESTONE RETURNS ON NORTH ELEVATION
- ④ REMOVE AWNING COMPLETE
- ⑤ REPAIR ALL HOLES AFTER REMOVING AWNING
- ⑥ REMOVE SIX (6) SCREWS/BOLTS FROM LIMESTONE. PATCH TWELVE (12) HOLES.



B WEST ELEVATION

SCALE: 1/8" = 1'-0"

PAINT COLORS:

COLOR 'A': BENJAMIN MOORE 'TAPESTRY BEIGE'

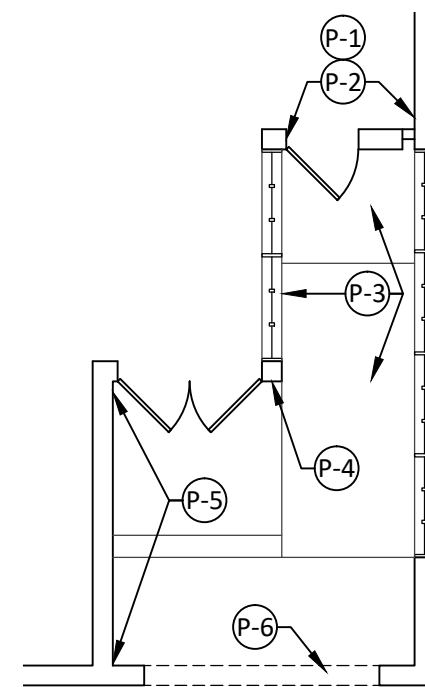
COLOR 'B': DARK ACCENT TO BE DETERMINED

COLOR 'C': BENJAMIN MOORE 'CLOUD WHITE'

FLOOR PLAN NOTES:

CLEAN ALL WALLS, CEILING AND SLAB SURFACES

- Ⓟ-1 PAINT WALL AND FRAME, COLOR 'A'
- Ⓟ-2 PAINT DOOR AND TRANSOM, COLOR 'B'
- Ⓟ-3 PAINT CEILING AND ASSOCIATED TRIM, COLOR 'C'
- Ⓟ-4 PAINT COLUMN, COLOR 'A'
- Ⓟ-5 PAINT WALL, COLOR 'A'
- Ⓟ-6 PAINT WOOD HEAD AND JAMB TRIM, COLOR 'B'



A ENTRY ALCOVE FLOOR PLAN

SCALE: 1/8" = 1'-0"

revisions

project title

213 S ROGERS ST
 FACADE REHABILITATION
 BLOOMINGTON, INDIANA
 213 S ROGERS ST

project information

PROJECT NO: 19-47
 ISSUE DATE: 10.9.19
 REVISION DATE:

DRAWN BY:
 CHECKED BY:

sheet title

ELEVATION & FLOOR PLAN

sheet number

A1

SECTION 04500 - MASONRY RESTORATION AND CLEANING

PART 1 GENERAL

1.01 RELATED DOCUMENTS

- A. Drawings, photos and general provisions of Contract, including General and Supplementary Conditions and Division-1 Specification sections, apply to work of this section.

1.02 DESCRIPTION OF WORK

- A. Extent of masonry restoration work is indicated on drawings and photos.
- B. Masonry restoration work includes the following:
 - 1. Tuckpointing mortar joints where shown. NOTE: This spec is not for total repointing.
 - 2. Stone repair where shown.
 - 3. Stone and brick cleaning all surfaces.
 - 4. Finial cleaning

1.03 QUALITY ASSURANCE

- A. Restoration Specialist: Work must be performed by a firm having not less than 5 years successful experience in comparable masonry restoration projects and employing personnel skilled in the restoration processes and operations indicated.
- B. Repointing: Prepare 2 separate sample areas of approximately 2 feet high by 2 feet wide for each type of repointing required, one for demonstrating methods and quality of workmanship expected in removal of mortar from joints and the other for demonstrating quality of materials and workmanship expected in pointing mortar joints appearance to adjacent existing joints. The intent of the new pointing work is to match cleaned existing mortar. Newly pointed areas shall be consistent with existing adjacent mortar joints for color and texture.

1.04 SUBMITTALS

- A. Product Data: Submit manufacturer's technical data for each product indicated including recommendations for their application and use. Include test reports and certifications substantiating that products comply with requirements.
- B. Samples: Submit, for verification purposes, samples of the following:
 - 1. Each new exposed masonry mortar to be used for replacing existing materials. Include in each set of samples the full range of colors and textures to be expected in completed work.
 - 2. Each type of chemical cleaning's material data.
 - 3. Each type of chemical clear sealer's manufacturers data.
 - 4. Stone masonry patching materials product data and application instructions

1.05 DELIVERY, STORAGE AND HANDLING

- A. Deliver materials to site in manufacturer's original and unopened containers and packaging, bearing labels as to type and names of products and manufacturers.
- B. Protect masonry restoration materials during storage and construction from wetting by rain, snow or ground water, and from staining or intermixture with earth or other types of materials.
- C. Protect grout, mortar and other materials from deterioration by moisture and temperature. Store in a dry location or in waterproof containers. Keep containers tightly closed and away from open flames.

Protect liquid components from freezing. Comply with manufacturer's recommendations for minimum and maximum temperature requirements for storage.

1.06 PROJECT CONDITIONS

- A. Do not repoint mortar joints or repair masonry unless air temperatures are between 40 deg.F (4 deg.C) and 80 deg.F (27 deg.C) and will remain so for at least 48 hours after completion of work.
- B. Prevent grout or mortar used in repointing and repair work from staining face of surrounding masonry and other surfaces. Remove immediately grout and mortar in contact with exposed masonry and other surfaces.
- C. Protect sills, ledges and projections from mortar droppings.

1.07 SEQUENCING/SCHEDULING

- A. Perform masonry restoration work in the following sequence:
 - 1. Chemically clean cut stone masonry
 - 2. Rake-out existing mortar from joints indicated to be repointed.
 - 3. Repoint existing mortar joints of masonry indicated to be restored.

PART 2 PRODUCTS

2.01 MASONRY MATERIALS

- A. Mortar materials
 - 1. Portland Cement: ASTM C 150, Type I.
 - 2. Hydrated Lime: ASTM C 207, Type S.
 - 3. Colored Mortar Aggregate: Natural or manufactured sand selected to produce mortar color to match adjacent existing mortar color.
 - 4. For pointing mortar provide sand with rounded edges.
 - 5. Match size, texture and gradation of existing mortar as closely as possible.
 - 6. Colored Mortar Pigment: Natural and synthetic iron oxides and chromium oxides, compounded for use in mortar mixes. Use only pigments with record of satisfactory performance in masonry mortars.
 - 7. Water: Clean, free of oils, acids, alkalis and organic matter.

2.02 CLEANING MATERIALS AND EQUIPMENT

- A. Limestone Cleaner: Manufacturer's as indicated below for cleaning for cut and rough-cut limestone.
- B. Approved Manufactures
 - 1. Sika Corporation
 - 2. ProSoCo Inc. (Used as standard)
 - 3. Thuro
- C. Materials: The specified cleaning application is a three- (3) step process requiring all of the following products. ProSoCo Sure Klean products are used as a standard. Equal products for each application by Sika or Thuro are acceptable for cut stone and rough-cut rubble stone:
- D. For Cut stone masonry
 - 1. First application, Sure Klean 766 Limestone and Masonry Prewash.
 - 2. Second application, Sure Klean Limestone and Masonry Afterwash.

3. Third Application, Sure Klean Weather Seal Siloxane PD Natural Stone Treatment.
- F. For spot problem stains where required
1. Product: Subject to compliance with requirements, provide "Sure Klean Limestone Restorer", ProSoCo, Inc.
- G. Water for Cleaning: Clean, potable, free of oils, acids, alkalis, salts, and organic matter.
1. Warm Water: Heat water to temperature of 140 deg.F-180 deg.F (60 deg.C-82 deg.C).
- H. Brushes: Fiber bristle only.
- I. Spray Equipment: Provide equipment for controlled spray application of water and chemical cleaners, if any, at rates indicated for pressure, measured at spray tip, and for volume.
1. For spray application of chemical cleaners provide low-pressure tank or chemical pump suitable for chemical cleaner indicated, equipped with cone-shaped spray-tip.
 2. For spray application of water provide fan-shaped spray-tip which disperses water at angle of not less than 15 degrees.

2.03 STONE REPAIR

- A. Stone-to-Stone Adhesive: Two-part polyester resin stone adhesive with a 15-30 minute cure at 70 deg.F (21 deg.C), in formulation (knife or flowing grade) recommended by adhesive manufacturer for type of stone repair indicated, and in color indicated or, if not otherwise indicated, as selected by Architect from tinted or standard colors available from adhesive manufacturer.
1. Product: Subject to compliance with requirements, provide "Akemi" adhesives distributed by Wood and Stone, Inc., 7567 Gary Road, Manassas, VA 22110.
- B. Mortar-to-Stone Adhesive: High modulus, high strength, moisture insensitive epoxy adhesive with a pot life of 30 minutes at 40 deg.F (4 deg.C).
1. Product: Subject to compliance with requirements, provide "Sikadur Hi-Mod Epoxy, Sikastix 370"; Sika Chemical Corporation.

2.04 POINT MORTAR MIXES

- A. General:
1. Measurement and Mixing: Measure cementitious and aggregate material in a dry condition by volume or equivalent weight. Do not measure by shovel, use known measure. Mix materials in a clean mechanical batch mixer.
 2. Mixing Pointing Mortar: Thoroughly mix cementitious and aggregate materials together before adding any water. Then mix again adding only enough water to produce a damp, unworkable mix, which will retain its form when, pressed into a ball. Maintain mortar in this dampened condition for 1-to-2 hours. Add remaining water in small portions until mortar of desired consistency is reached. Use mortar within 30 minutes of final mixing; do not retemper or use partially hardened material.
 3. Colored Mortar: Produce mortar of color required by use of selected ingredients. Do not adjust proportions without Architect's approval.

PART 3 EXECUTION

3.01 MASONRY CLEANING

A. PREPARATION

1. General: Comply with recommendations of manufacturers of chemical cleaners for protecting building surfaces against damage from exposure to their products.
2. Protect persons, motor vehicles, surrounding surfaces of building whose masonry surfaces are being restored, building site, mask windows and window frames.
3. Prevent chemical cleaning solutions from coming into contact with pedestrians, motor vehicles, landscaping, buildings and other surfaces, which could be injured by such contact.
4. Do not clean masonry during winds of sufficient force to spread cleaning solutions to unprotected surfaces.
5. Dispose of run-off from cleaning operations by legal means and in manner which prevents soil erosion, undermining of paving and foundations, damage to landscaping, and water penetration into building interiors.
6. Erect temporary protection covers over pedestrian walkways and at points of entrance and exit for persons and vehicles, which must remain in operation during course of masonry restoration work.
7. Protect glass and unpainted metal trim from contact with chemical cleaners by covering them with liquid strippable masking agent or polyethylene film and waterproof masking tape. Apply masking agent to comply with manufacturer's recommendations. Do not apply liquid masking agent to painted or porous surfaces.

B. Chemical Cleaner Application Methods:

1. General: Apply chemical cleaners to masonry surfaces to comply with chemical manufacturer's recommendations using brush or spray application methods, at Contractor's option, unless otherwise indicated. Do not allow chemicals to remain on surface for periods longer than that indicated or recommended by manufacturer.

C. CLEANING APPLICATION FOR CUT STONE

Sequence of product application:

1. Prewet surface.
2. Prewash: After tests have determined desirable mix solution apply 766 Prewash with deep-napped synthetic roller or nylon brush. Do not use natural fiber.
3. Allow Prewash to remain on surface for 30 minutes to one hour.
4. Rinse with pressure washer fitted with fan type spray no smaller than 15 degrees.
5. Immediately after rinsing 766 Prewash apply prepared (to desired dilution) Afterwash to wet surface with roller or brush as specified for Prewash.
6. Allow the Afterwash to remain on the surface for three to five minutes.
7. Pressure rinse from the bottom of the treated area to the top. Thoroughly rinse all chemicals from coping and down exterior walls.
8. Sealer: Allow cleaned surfaces to completely dry.
9. Apply undiluted Weather Seal Siloxane PD with brush or roller sufficient material to thoroughly saturate the surface. Brush out heavy runs, pools or puddles until they completely penetrate.

Note: during the entire applications process the lower masonry areas must be continuously rinsed to avoid rundown staining of adjacent stone masonry.

3.02 STONE REPAIR

- A. Carefully remove loose stone fragments in areas which are indicated for repair. Reuse only pieces of spalled stone which are in sound condition.
- B. Remove soil, loose stone particles, mortar, and other debris and foreign material from surfaces to be bonded of both fragment and building stone from which it was removed by cleaning with stiff brush.
- C. Apply adhesive to comply with adhesive manufacturer's directions. Coat bonding surface of building stone with stone-to-stone adhesive completely filling all voids and covering all surfaces. Fit stone fragments onto building stone while adhesive is still tacky and hold fragment securely in place until adhesive has cured.
- D. After adhesive has cured fully, further anchor stone fragments larger than 6"x 6" x 6" in any dimension with 1/4" diameter plain stainless-steel rods set into 1/4" diameter holes drilled at a 45 degree downward angle through face of stone. Center and space anchor rods not more than 5" nor less than 3" apart and not less than 2" from any edge. Insert rods not less than 2" into backing stone and 2" into fragment with end countersunk at least 3/4" from exposed face of stone.
- E. Clean any residual adhesive from edges. Wet stone and fill any chipped areas and fill holes with patching mortar. Avoid featheredging. Finish patched areas to match texture of and be level with adjoining surrounding stone surfaces. Keep patching mortar damp for 72 hours.

3.03 STONE PATCHING

- A. Remove loose particles, soil, debris, oil and other contaminants from existing stone units at locations indicated by cleaning with stiff brush.
- B. Brush coat stone surfaces with mortar-to-stone adhesive to comply with manufacturer's directions.
- C. Place patching mortar in layers no thicker than 2". Roughen surface of each layer to provide key for next layer.
- D. Keep each layer damp for 72 hours or until mortar has set.
- E. Unacceptable patches are defined as those with hairline cracks or showing separation from stone at edges. Remove patches and refill to provide patches free of those defects.

3.04 REPOINTING EXISTING MASONRY

- A. Joint Raking:
 - 1. Rake out mortar from joints to depths equal to 2-1/2 times their widths but not less than 3/4" nor less than that required to expose sound, unweathered mortar.
 - 2. Remove mortar from masonry surfaces within raked-out joints to provide reveals with square backs and to expose masonry for contact with pointing mortar. Brush, vacuum or flush joints to remove dirt and loose debris.
 - 3. Do not spall edges of masonry units or widen joints. Replace any masonry units, which become damaged.
 - 4. Cut out old mortar by hand with chisel and mallet, unless otherwise indicated.

5. Power operated rotary hand saws and grinders will be permitted but only on specific written approval of Architect based on submission by Contractor of a satisfactory quality control program and demonstrated ability of operators to use tools without damage to masonry. Quality control program shall include provisions for supervising performance and preventing damage due to worker fatigue.

B. Joint Pointing:

1. Rinse masonry joint surfaces with water to remove any dust and mortar particles. Time application of rinsing so that, at time of pointing, excess water has evaporated or run off, and joint surfaces are damp but free of standing water.
2. Apply first layer of pointing mortar to areas where existing mortar was removed to depths greater than surrounding areas. Apply in layers not greater than 3/8" until a uniform depth is formed. Compact each layer thoroughly and allow to become thumbprint-hard before applying next layer.
3. After joints have been filled to a uniform depth, place remaining pointing mortar in 3 layers with each of first and second layers filling approximately 2/5 of joint depth and third layer the remaining 1/5. Fully compact each layer and allow to become thumbprint hard before applying next layer. Where existing masonry has rounded edges recess tool final layer slightly back from face of masonry. Take care not to spread mortar over edges onto exposed masonry surfaces, or to featheredge mortar.
4. When mortar is thumbprint hard, tool joints to match original appearance of joints, unless otherwise indicated. Remove excess mortar from edge of joint by brushing.
5. Cure mortar by maintaining in a damp condition for not less than 72 hours.
6. Where repointing work precedes cleaning of existing masonry allow mortar to harden not less than 30 days before beginning cleaning work.
7. Owner shall have the right to perform periodic tests to verify depth of repointing. Contractor shall repair with like materials area where mortar has been removed to ascertain depth of repointing.

3.05 FINAL CLEANING

- A. After mortar has fully hardened thoroughly clean exposed masonry surfaces of excess mortar and foreign matter using stiff nylon or bristle brushes and clean water, spray applied at low pressure.
- B. Use of metal scrapers or brushes will not be permitted.
- C. Use of acid or alkali cleaning agents will not be permitted.

END OF SECTION 04500