

# INNOVATE INDIANA

## REGIONAL CITIES OF NORTHERN INDIANA



**REGIONAL CITIES**  
OF NORTHERN INDIANA

### **Innovate Indiana Regional Development Plan**

NOTRE DAME | SOUTH BEND | ELKHART | MISHAWAKA | PLYMOUTH | GOSHEN | NAPPANEE

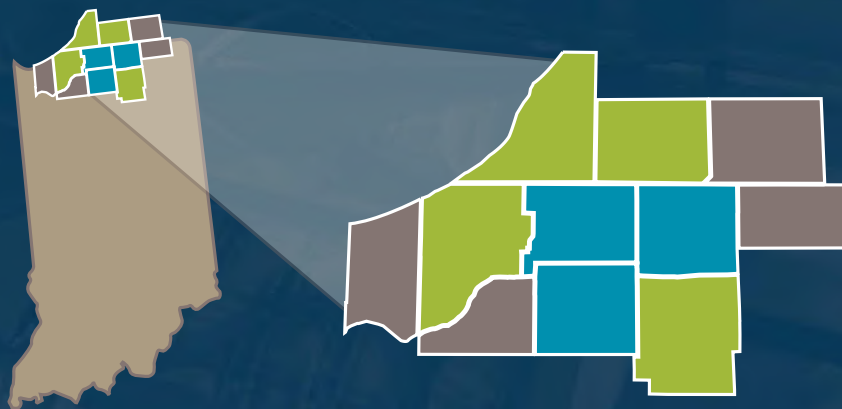


# INNOVATE INDIANA

REGIONAL CITIES OF  
NORTHERN INDIANA



REGIONAL CITIES OF NORTHERN INDIANA  
& SUPPORTING COUNTIES



■ **PRIMARY COUNTIES**

St. Joseph County, Elkhart County & Marshall County

■ **SUPPORTING COUNTIES**

LaPorte, Kosciusko, Berrien (MI), Cass (MI)



# REGIONAL CITIES OF NORTHERN INDIANA

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# EXECUTIVE SUMMARY & INTRODUCTION



## EXECUTIVE SUMMARY & INTRODUCTION

# A “Vision” for Northern Indiana: INNOVATE INDIANA

Northern Indiana is a knowledge-driven, highly connected region that serves and provides access to a global innovation economy. We will be recognized for our **World-Class Higher Education and Community Partnerships, Superior Access and Connectivity, and High-Performing Communities**. Northern Indiana is the proud home to Notre Dame, and will become a region of connected innovation hubs.

## A Call to Action: ATTRACT THE TALENT

The Regional Cities Initiative (RCI) has drawn necessary attention to a critical economic development truth—without a growing, highly skilled resident population, communities will fail to realize their full investment and economic potential. One of the nation’s leading economic development publications, *Area Development* magazine’s 2015 survey of company executives states, “With U.S. economic growth on a firmer footing, and demand ticking up, the availability of skilled labor has become the #1 factor in site decisions... rising from the #3 factor in the year-earlier survey.”

While “access to talent” has always been the fundamental raw material for our nation’s knowledge-intensive economy, attracting and retaining that talent is complex. Jobs, cost of living, family connections and personal preferences are among the factors that often blend serendipitously to influence a “next great” or “best place” ranking. In attracting talent and development investment for the longterm, regions must

working together strategically, linking existing assets to close gaps where they exist.

For the last several decades, Northern Indiana has struggled to attract new residents and retain the tens of thousands of high-value students and professionals that have, at one time, called the communities of Northern Indiana home. With over 40,000 people enrolled in higher education programs in the region, there is a pipeline of talent primed for retention within the region. Programs like South Bend’s enFocus have been developed to capitalize on this opportunity and have the ability to scale and support retention efforts across all colleges and universities in the region. The Urban Institute estimates that the region will experience a 1.04% population growth between 2010 and 2030.<sup>[1]</sup> The region’s aging population will further impact the local workforce as older workers retire if no one is there to succeed them.



## EXECUTIVE SUMMARY & INTRODUCTION

### Population and Prosperity

While growing the overall population is important, are not guaranteed higher wages, economic output and overall prosperity. The research thinktank CityLab.com points out that while the well-known “sunbelt” regions and coastal settings of the U.S. have been rapidly growing in population for years, a large part of that constituency is retirees who are no longer part of the labor force. More knowledge-centric regions, on the other

hand, like those found in the Northeast and Midwest, have been building higher-value economies and networks through technology, innovation and startups, even while their populations have been growing slower than metro averages (less than 1%). Indeed, researchers report that high-wage innovation jobs are the drivers of prosperity—and in most cases, population growth—for many communities around the country.

### Growth Through Employment

Fundamental interdependencies are found among high-value job opportunities, wage growth, and talent attraction. Pretty streetscapes, sports venues, and parks in and of themselves do not guarantee sustained economic growth. The Regional Cities of Northern Indiana: Innovate Indiana plan and project portfolio developed for this initiative recognize this reality by adopting a “population through competitive employment” principle.

This principle recognizes that without foundational, high-value employment opportunities, along with the right amenities, social network and innovation resources to nurture those opportunities, it will remain difficult for regions like Northern Indiana to attract new talent and reverse the stagnant population trends. We must work to create and promote new places, spaces, connections and value unique to our region for our residents and businesses to access and leverage.



## EXECUTIVE SUMMARY & INTRODUCTION

FIGURE 1

### EMERGENCE OF INNOVATION DISTRICTS



## Building Upon Key Success Factors

Innovate Indiana draws upon research and insights gained from the Regional Cities Report and its best practice learning as well as a growing body of knowledge within the emerging discipline of place-based economic development. Place-based development strategies work to align and improve both the physical environment in which people live and work and the unique

resources that exist within communities that can support business development and innovation for greater economic development output. The plan works to influence four key place-based success factors critical in creating competitive places and employment centers.

They include: **Density**, **Connectivity**, **Amenities**, and **Productivity** (figure 1).



## EXECUTIVE SUMMARY & INTRODUCTION

### Building Upon Key Success Factors



#### Density

The rise of the knowledge economy in large part relies upon the ability for people and businesses to interact easily among each other. Considerable research in recent years has pointed to the value of “density among people and businesses” as an economic development objective. Innovate Indiana includes major real-estate development opportunities and programmatic initiatives designed to create a greater scale and density for people and businesses to interact, building high-value relationships and value chains unique to our region.



#### Connectivity

Ensuring greater connectivity among people and businesses is another plan priority. While information and communication exchange is a basic aspect of connectivity in a knowledge-intensive economy, Innovate Indiana further addresses physical connectivity within the region and with nearby markets. Projects work to address the extension of broadband connectivity and trail development within the region and improved rail service to Chicago.



#### Amenities

While a job is a key reason why talent may move or stay in a certain community, it is not the only reason. How an individual feels about and enjoys the place in which he or she chooses to live and work is more of a driver now than ever before. By encouraging new amenity development such as recreational assets, parks, trail systems, transit services and entertainment venues, the plan works to attract and retain people who will provide services and invest in amenities that support and enhance the region’s overall experience and quality of place.



#### Productivity

Productivity is often viewed as a main measure or determinant of living standards for a particular market region. Higher productivity based on innovation and technology can lead to lower average costs of goods/services sold, higher profits, higher wages and overall economic growth. Innovate Indiana is positioned to strengthen and ensure that key ingredients, such as highly educated workers and technology resources, are present within the region to increase the overall productivity and output for the Northern Indiana Region.



## EXECUTIVE SUMMARY & INTRODUCTION

# From Plan to Action: THE REGIONAL INNOVATION DISTRICT NETWORK

Over the course of this planning process, more than 2,000 stakeholders representing industry, education, economic development, elected officials, and the general public were engaged through a series of interviews, meetings, presentations and working group discussions held in each county across the Northern Indiana Region. In addition to identifying transformative projects and how those projects would impact the

region as a whole, a planning framework was developed to both address the immediate opportunities reflected in the RCI process and the longer-term planning and development objectives for the region going forward.

With the success factors understood and the vision defined, the RCNI Steering Committee plans to continue to engage regional

stakeholders and implement the Innovate Indiana project portfolio by developing a formal “Regional Innovation District Network”—a network consisting of key city-innovation hubs throughout the region.

The Brookings Institute recently published a detailed analysis on the emergence of Innovation Districts throughout the country. Brookings describes these districts as “geographic areas where leading-edge anchor institutions and companies cluster and connect with startups, business incubators and accelerators.” [2]

The Regional Innovation District Network approach will help to achieve the region’s vision of establishing world-class Higher education and community partnerships, Access and Connectivity, and High-Performing Communities in which we live and work.

[2] <http://www.brookings.edu/about/programs/metro/innovation-districts>



## EXECUTIVE SUMMARY & INTRODUCTION

# From Plan to Action: THE REGIONAL INNOVATION DISTRICT NETWORK

The Regional Innovation District Network approach will help to achieve the region's vision of establishing World-Class Higher Education and Community Partnerships, Access and Connectivity, and High-Performing Communities in which we live and work:

### 1. World-Class Higher education and community partnerships

We will recognize, employ, and build relationships between higher education and the region's communities to enhance the region's:

- a. R&D, commercialization and entrepreneurship activities
- b. Business talent and attraction efforts
- c. Workforce development and retention results

### 2. Superior Access and Connectivity

We will improve physical and social connectivity within the region and beyond to ensure:

- a. Advantageous exchange of ideas
- b. Access to educational and business technologies, services and partnerships
- c. Access to markets and job opportunities

### 3. High-Performing Communities

We will invest in programs and facilities that will enhance the region's:

- a. Positive health outcomes
- b. Tourist and visitor attraction
- c. Resident retention and attraction



## EXECUTIVE SUMMARY & INTRODUCTION

### A Fit for Northern Indiana Notre Dame as a Partner

Northern Indiana is ideally suited to adopt and build upon the innovation district model.

The region has several key anchor cities, each with unique innovation assets, place-based character, and employment drivers, all less than an hour apart.

The region enjoys a differentiating global strength as home to the University of Notre Dame and other colleges which are collectively educating upwards of 40,000 students. As noted by Jim Clifton in *The Coming Jobs War*, Universities, by design, create the best ecosystem for entrepreneurship and innovation.”

The University of Notre Dame, located on a 1,250-acre campus in the center of South Bend, is the most evident leading-edge anchor institution of the innovation ecosystem in Northern Indiana. Both as a major regional enterprise in its own right and through its mission of education, research and service to the community, Notre Dame is a major contributor to the current and future economic vitality of the City of South Bend, the Northern Indiana

“

Universities, by design, create the best ecosystem for entrepreneurship and innovation.

- *The Coming Jobs War*

Region and the State of Indiana. The University's contribution to the ongoing development of the regional economy and its growing partnership with the community provide a solid foundation for transformational change in the region. The direct and indirect benefits account for over \$1.3 billion in economic activity in St. Joseph County, and the University generates more than \$16 million in state and local tax revenues. A recent economic impact study<sup>[3]</sup> conducted by Appleseed Economic Consultants, further describes and quantified this partnership that benefits both the region and the University.

<sup>[3]</sup> <http://www.impact.nd.edu>



## EXECUTIVE SUMMARY & INTRODUCTION

Notre Dame developed a Community Engagement Strategic Plan in 2012 based on a mission to establish and deepen a culture of community engagement at the University of Notre Dame. Such engagement emanates directly from the University's Catholic ethos and character and builds on the rich assets of its students, faculty, staff, and community partners. Engagement of myriad forms—across the domains of teaching, research, and service—addresses community issues in a collaborative and reciprocal way that capitalizes on faculty and staff expertise and deeply engages students. Moreover, Notre Dame's approach to engagement values local citizens and organizations as resources for learning and partners in community improvement.<sup>[4]</sup>

In an effort to achieve its overall aspiration of becoming a preeminent research university with a distinctive Catholic mission and an unsurpassed undergraduate education, the University of Notre Dame strives to meet the five institutional goals. One of the five goals of the University's Strategic Plan<sup>[5]</sup> is to "Engage in external collaborations that extend and deepen Notre Dame's impact." The plan details the "need to expand our collaboration at home, investing our time and resources with partners in South Bend and the Michiana region to support the area's economic growth, both for the sake of the region itself and its role in making Notre Dame a leading place to teach, learn research, and work."

Notre Dame is partnering with the business community and local government to capitalize on the innovation capacity being developed both on and off campus. In addition to developing new sources of economic growth and innovation to firmly establish this region as a nationally recognized attractive place to live and work. An economic powerhouse that provides a strong quality of place to attract and retain future generations of Hoosiers, both residents growing up in the region and the students that move here to obtain a world-class education. Northern Indiana is known as the home of Notre Dame, and will become a region of connected innovation hubs.

**“  
Innovation districts  
have the unique potential  
to spur productive,  
inclusive & sustainable  
economic development.**

*- The Brookings Institute*

<sup>[4]</sup> [http://engagement.nd.edu/assets/137669/cecc\\_strategic\\_plan\\_final.pdf](http://engagement.nd.edu/assets/137669/cecc_strategic_plan_final.pdf)

<sup>[5]</sup> <http://strategicplan.nd.edu/university-plan>



## EXECUTIVE SUMMARY & INTRODUCTION

### Innovate Indiana: The Plan Details

The following plan discusses in detail each of the key sections required in the RCI guidelines to include key trends, current state of the region, process, projects, and a

strategy for long-term engagement. Sections have been ordered to reflect the narrative flow and content unique to the Northern Indiana strategy and project portfolio.



### The Project Portfolio

The projects identified in this first phase represent foundational and transformational investments critical in establishing a Regional Innovation District Network. These projects are designed to enhance various assets and close gaps within each hub city while addressing at least one (and often more than one) of the four key success factors discussed earlier. Larger anchor projects, such as the Renaissance District project, are expected to create the needed scale and density that will impact and serve each of the innovation hubs in the short term.

Together, the RCNI is advancing 39 projects with a total capital investment of \$703.4 million for RCI review and funding consideration.

The Northern Indiana Regional Development Authority (RDA) and the Innovate Indiana Steering Committee will manage the overall project portfolio coordination and cross-hub communication. Projects and initiatives unique to each hub city will be managed and developed by local advisory committees at the county and municipality level.



# THE REGION ENGAGED



## THE REGION ENGAGED

### Northern Indiana Region

The Northern Indiana Region rallied early around the Regional Cities opportunity and has been supportive and actively engaged throughout the planning process. This effort began in December 2014 when the Michiana Partnership led a fundraising effort that generated \$200,000 to develop a regional plan.

Michiana Partnership and Michiana Area Council of Governments (MACOG) led the planning process with support from the City of Goshen and enFocus. enFocus is a South Bend nonprofit that connects recent college graduates with local organizations to develop and implement business, operational, community and technology solutions. In January 2015, a 28-person Steering Committee was formed

representing business, education (K-12 and higher education), government, community foundations, real estate, workforce, and economic development from Elkhart, Marshall and St. Joseph counties. A detailed list of participating stakeholders is attached (Exhibit A-1).

Regional stakeholders and the public at-large were notified and involved in the planning process through a variety of approaches (figure 2).

FIGURE 2

### REGIONAL CITIES OF NORTHERN INDIANA WORK GROUPS & STAKEHOLDERS





## THE REGION ENGAGED

### Northern Indiana Region

Chambers of Commerce, economic development and planning organizations, city governments, Rotary groups, executive roundtable members and other partners from the region were instrumental in hosting events, educating the public at-large, and coordinating, and conducting public input sessions.

A detailed list of community engagement efforts is attached (Exhibit A-2), with activities and events that included:

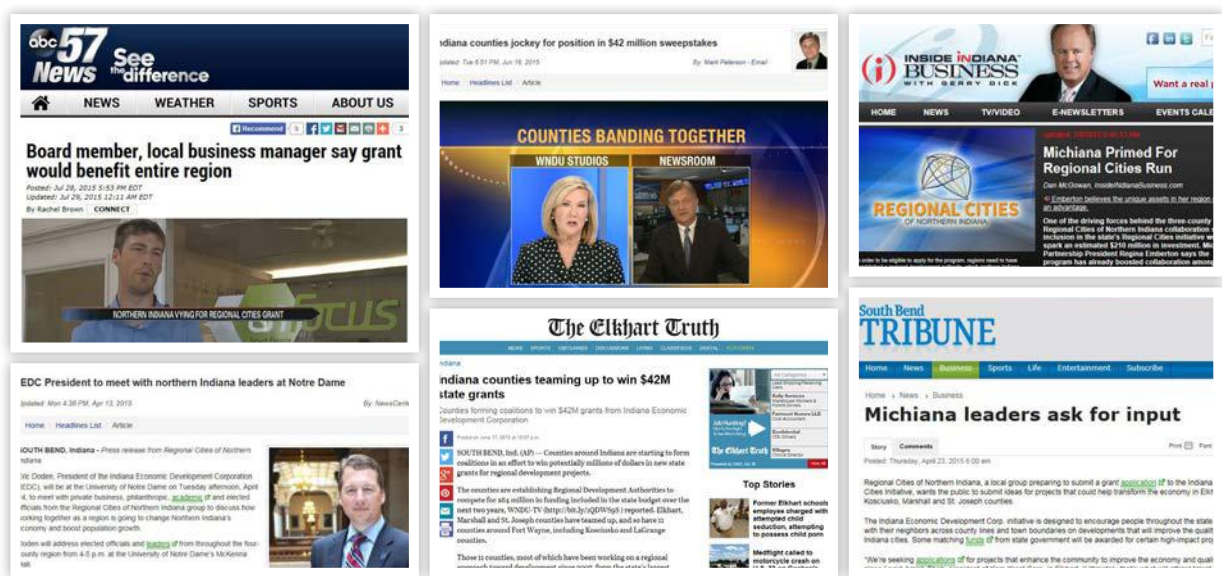
- November 2014: Kickoff meeting to introduce the region to the RCI initiative drew more than 200 people, the most of any region, to learn more.
- Over 40 regional leaders interviewed, including Steering and Strategy Committee members, to collect their input on the region's opportunities and challenges and potential project ideas.
- Early March 2015: First round of public input sessions conducted to collect ideas and feedback from the public about possible projects. Sessions were held in four counties, and more than 100 people participated.
- March 2015: St. Joseph County Chamber's Salute to Business luncheon, attended by 800 community leaders, featured the Regional Cities effort as the keynote address.
- March 19, 2015: Project leaders updated the public about the status of the region's RCI efforts at a public meeting.
- Early April 2015: The second round of public input sessions was conducted to present a refined list of project ideas and begin developing project applications for the regional development plan. Sessions were held in three counties, and nearly 100 people participated. Following these sessions, 45 project applications were submitted online from around the region for consideration in the plan.
- April 14, 2015: The University of Notre Dame hosted elected officials throughout the region to provide an update on the RCNI initiative and to discuss the Regional Development Authority (RDA).
- Early June 2015: With near unanimous support, the Elkhart, Marshall and St. Joseph County commissioners voted to adopt the ordinance to establish the RDA.
- Early June 2015: A focus group meeting with 15 private-sector executives validated the RCNI vision and goals.
- Late June 2015: The five-member RDA board was appointed by written agreement of the executives of the RDA members, and the members endorsed this regional development plan.



## THE REGION ENGAGED

## Northern Indiana Region

FIGURE 3

REGIONAL CITIES OF NORTHERN INDIANA  
MEDIA ENGAGEMENT & COMMUNICATIONS

(Exhibit A-6)

In addition to in-person events and meetings, multiple marketing activities and media were also used to notify the public throughout the process. Project leaders also utilized social media to provide information, opportunities for engagement and updates about the process. The Facebook page “Regional Cities of Northern Indiana” and Twitter account “Regional Cities” were used to keep stakeholders aware and engaged of developments and opportunities available through the initiative. MACOG developed a website about the initiative, where the project application form was posted for public access<sup>[6]</sup>. Big Idea Company was hired to develop videos, photography and

other communications (figure 3). Local news coverage also provided updates and information about the process (Exhibit A-6).

The project team anticipates continuing this type of engagement during the plan execution period in order to provide updates to the public, at a minimum on an annual basis; some updates may be project-based and occur more frequently as needed.

Innovate Indiana represents the region's shared vision, plan, foundational project portfolio, and structure for transformative growth over the next eight years.

<sup>[6]</sup> <http://regionalcitiesofnorthernindiana.org>





# CURRENT TRENDS

EXECUTIVE SUMMARY	THE REGION ENGAGED	CURRENT TRENDS	STATE OF THE REGION & QUALITY OF PLACE	VISION & STRATEGY	PROJECTS	STAKEHOLDERS, EXECUTION & STRUCTURAL CHANGES	BENCHMARKING & MEASUREMENT	ADDITIONAL SUPPORT
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## CURRENT TRENDS

### Economic, Industry & Social Trends

High-performing places attract high-performing talent. Innovate Indiana draws upon research and insights gained from the Regional Cities Report and its best practice learning as well as a growing body of knowledge within the emerging discipline of place-based economic development. This knowledge base is influenced by economic, industrial, and social trends that practitioners are observing in the marketplace.

Place-based development strategies work to align and improve the physical environment in which people live and work for greater economic development output. The place-based approach works to ensure a quality and diversity of high-demand amenities such as civic-spaces, workplace settings, greenways, active transportation networks, and housing options—all needed

to attract the talent and investment required to fuel modern business. These strategies must further require that high-value innovation resources such as higher education, industry, and economic development intermediaries are engaged and coordinated, all working toward a common goal.

Northern Indiana leaders fully embrace the importance of “quality of place” and have developed a strategy to achieve this. Innovate Indiana recognizes four trending place-based success factors critical in creating competitive places and employment centers. These trends include: **Density, Connectivity, Amenities** and **Productivity**. A fifth trend: the emergence of **innovation districts**, offers a solution to address and embody the four success factors.



### Density

The rise of the knowledge economy in large part relies upon the ability for people and businesses to interact easily among each other. In recent years, considerable research has pointed to the value of density among people and businesses as an economic development objective. Foundational research such as *Consumer City*, recognized that, “The future of the city depends on the demand for density. If cities are going to survive and flourish,

then people must continue to want to live close to one another.”<sup>[7]</sup> Increasingly, modern developments—both within urban and suburban communities—look more like older traditional neighborhoods. They increasingly include a mix of uses and higher density housing in close proximity to work and play venues.<sup>[8]</sup> These environments offer more opportunity for people to meet, share information and form new relationships.

<sup>[7]</sup> [http://scholar.harvard.edu/files/glaeser/files/consumer\\_city.pdf](http://scholar.harvard.edu/files/glaeser/files/consumer_city.pdf)

<sup>[8]</sup> <http://www.wsj.com/articles/some-firms-learn-you-just-cant-beat-the-burbs-1431462944>



## CURRENT TRENDS

### Developing amenities should play a role in cities' labor attraction & retention policies

Beyond density within the built-environment, it is also important for communities within regions to build cross-border connections (density) and functionality. In the book *Regional Advantage*, author Annalee Saxenian's research found that, "Regions offer an important source of competitive

advantage even as production and markets become increasingly global. Geographic proximity promotes repeated interaction and mutual trust needed to sustain collaboration and to speed continual recommendations of technology and skill. When production is embedded in these regional social structures and institutions, firms compete by translating local knowledge and relationships into innovative products and services." <sup>[9]</sup>



### Connectivity

Physical, social, and communication connectivity is a must in today's fast-paced and knowledge-intensive economy. Businesses must quickly respond to customers and partners with products, services and information in order to remain competitive. Consumers and residents expect easy and reliable digital and physical access to social environments, workplaces and markets. In addition to local and outbound connectivity, communities are seeking ways to create connections and attractions that generate inbound traffic in terms of recreational visitors and business partners. A regular inflow of visitors

increases broader awareness of a region and what a region has to offer. This can lead to future investment and business opportunities.

Connectivity and alignment within regional and city economic development efforts is also required to compete in the global economy. In *The Coming Jobs War*, Jim Clifton states, "Every city needs a team to work on the alignment, focus and strategies that put all businesses and local institutions of absolutely every kind on the same page. Meanwhile, the whole city has to be participating, highly coordinated and working out of the same playbook to win." <sup>[10]</sup>

<sup>[10]</sup> Clifton, Jim. "The coming jobs war: what every leader must know about the future of job creation." New York, NY: Gallup Press, 2011: 66.



## CURRENT TRENDS



### Amenities

While a job is a key reason why talented individuals may move or stay in a certain community, it is not the only reason. How one feels about and enjoys the place in which he or she chooses to live and work is more of a driver now than ever before. As more people, especially the millennial generation (ages 21 to 33), are opting to become independent contractors or start their own business, the traditional pathway toward employment with larger legacy

companies may become much less traditional in future years. The online trade publication *EconomicDevelopment.org* reported:

*"In the skilled labour market of the 21<sup>st</sup> Century, people do not necessarily follow jobs. Instead, jobs appear to be following people. Research has shown that people tend to move to cities with plentiful amenities."*

Edward Glaeser, a professor at Harvard University, and one of the foremost academics on the subject, has found that cities with lots of urban amenities tend to grow faster. Terry Nichols Clark of the University of Chicago determined the existence of the same relationship along with some other interesting results. According to his research, college graduates preferred built urban amenities, the elderly favored natural amenities, and people engaged in technology patents liked both. In this way, developing amenities should play a role in cities' labor attraction and retention policies.<sup>[11]</sup>

Innovate Indiana recognizes four trending place-based success factors critical in creating competitive places and employment centers. They include: **Density, Connectivity, Amenities** and **Productivity**. A fifth trend, the **emergence of innovation districts**, offers a solution to address and embody the four success factors

<sup>[11]</sup> <http://economicdevelopment.org/2015/04/howtoattractpeopletoyourcityanditsnotjustaboutjobs/>



## CURRENT TRENDS



### Productivity

Clifton writes that gross domestic product (GDP) growth is fueled on, “the core energy of entrepreneurship and innovation.”<sup>[12]</sup> Higher productivity based on entrepreneurship, innovation and technology can lead to lower average costs of goods/services sold, higher profits, higher wages and overall economic growth. Because of this, productivity is often viewed as a main measure or determinant of living standards for a particular market region.

“  
Economic success  
of a city has been  
increasingly  
defined by its  
number of highly  
educated workers.

- *The New Geography of Jobs*

“  
Innovation districts  
have the unique potential  
to spur productive,  
inclusive & sustainable  
economic development.

- *The Brookings Institute*

Productivity and positive economic outcomes at both the community and individual level are dependent upon a highly educated workforce and talent base. Enrico Moretti, author of *The New Geography of Jobs*, states that, “Since 1980, data shows that the economic success of a city has been increasingly defined by its number of highly educated workers. Cities with many college-educated workers and innovative employers started attracting more of the same, and cities with a less educated workforce and less innovative employers—such as traditional manufacturing—started losing ground.”<sup>[13]</sup> At the individual level, the household earnings gap between the college-educated and the high school-educated has almost doubled from \$30,298 in 1979 to \$58,249 in 2012.<sup>[14]</sup>

<sup>[12]</sup> Clifton, Jim. “The coming jobs war: what every leader must know about the future of job creation.” New York, NY: Gallup Press, 2011: 54

<sup>[13]</sup> <http://www.wsj.com/articles/SB10001424127887324576304579072773954985630>

<sup>[14]</sup> <http://www.sciencemag.org/content/344/6186/843.full?ijkey=75Wfa..Upt6b6&keytype=ref&siteid=sci>





## CURRENT TRENDS

### Emergence of Innovation Districts

The Brookings Institute recently published a detailed analysis on the emergence of formal Innovation Districts<sup>[15]</sup> throughout the country and across the world. These districts embody and enable the four trending success factors of density, connectivity, amenities, and productivity. Brookings describes these districts as “geographic areas where leading-edge anchor institutions and companies cluster and connect with startups, business incubators and accelerators. They are also physically compact, transit-accessible and technically-wired, and offer mixed-use housing, office and retail. Innovation Districts have the unique potential to spur productive, inclusive and sustainable economic development.”<sup>[16]</sup> Additionally, one of the ways innovation districts are being created is by anchor institutions (re)locating facilities and programs to urban areas in order to access a cluster of advantageous activity.

Districts are emerging in international locations such as Barcelona, London, Montreal, Toronto, and Seoul. Domestically, these districts are taking a variety of forms based on local conditions in communities around the United States. “Districts are emerging near anchor institutions in the downtowns and mid-towns of cities like Atlanta, Baltimore, Buffalo, Cambridge,

Cleveland, Detroit, Houston, Philadelphia, Pittsburgh, St. Louis, and San Diego. They are developing in Boston, Brooklyn, Chicago, Portland, Providence, San Francisco and Seattle where underutilized areas (particularly older industrial areas) are being re-imagined and remade. Still others are taking shape in the transformation of traditional exurban science parks like Research Triangle Park in Raleigh-Durham, which are scrambling to meet demand for more urbanized, vibrant work and living environments.”<sup>[17]</sup>

Brookings recognized that, when fully functional, Innovation Districts, “enable companies, entrepreneurs, workers, researchers and investors to work across disparate sectors and institutions to commercialize ideas and co-invent and co-produce new discoveries for the market. They foster innovation across industries by concentrating people with different knowledge and expertise in dense urbanized areas; experts in technology, for example, work closely with experts in bioscience, finance, education and energy. Innovation Districts are, in essence, the vanguard of a new “convergence economy” which is galvanizing the growth of more competitive firms and higher quality jobs and spurring expansion in supportive professional and commercial service sectors.”<sup>[18]</sup>

<sup>[15]</sup> <http://www.brookings.edu/research/papers/2015/06/24oneyearinnovationdistrictskatzveywagner>

<sup>[16]</sup> <http://www.brookings.edu/about/programs/metro/innovation-districts>

<sup>[17]</sup> <http://www.brookings.edu/~media/Programs/metro/Images/Innovation/InnovationDistricts1.pdf>, page 1

<sup>[18]</sup> <http://www.brookings.edu/~media/Programs/metro/Images/Innovation/InnovationDistricts1.pdf>, page 4



# CURRENT STATE OF THE REGION & QUALITY OF PLACE



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

Northern Indiana has a variety of economic, demographic and quality of place strengths and challenges related to the key place-based development success factors of density, connectivity, amenities and productivity. The region's ability to enhance its competitiveness and attract talent is threatened by flat population growth, a labor force participation cliff, lagging productivity rates and the need for additional amenities. The region's key strengths include: many existing place-based assets, a competitive cost structure, access to markets, higher education resources, and cultural diversity.

Innovation Districts are already emerging throughout the region, and leaders are exploring additional place-based development opportunities in their communities, through initiatives such as Smart Streets in Downtown South Bend and Horizon 3.0 in Elkhart County.

“

**RISING FROM THE ASHES**  
As South Bend finds the  
future, ND's part shifts  
from Rockne to research.

- Notre Dame Magazine, Summer 2015  
(Exhibit C-4)



### Density

Northern Indiana's culturally rich communities are a positive feature for many prospective residents and businesses. If broader current population and demographic trends continue, however, the region's ability to achieve population and employment density will decline as population growth slows and the existing workforce ages and retires.

Northern Indiana's increasingly diverse community is a strength and opportunity as more Americans prefer to live in communities with diverse populations,<sup>[19]</sup> and businesses with more diverse workforces report higher rates of innovation and growth compared to less diverse organizations.<sup>[20]</sup>

<sup>[19]</sup> <http://uli.org/wp-content/uploads/ULI-Documents/America-in-2015.pdf>

<sup>[20]</sup> <https://hbr.org/2013/12/how-diversity-can-drive-innovation>



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

The region's Hispanic/Latino population, 10% of the population, is greater than the state's (6%). The largest concentration of Hispanic population is in Elkhart County with 28,064, which is almost 15% of the population. The next largest population is in St. Joseph County; which it makes up the smallest percentage of the total population at 7%.

Retirees are attracted to the area due to the low cost of living, access to amenities and proximity to major cities. Stakeholders shared anecdotes of retired couples moving to the area from Chicago to take advantage of a convenient, less expensive lifestyle in a location with many recreational opportunities and access to Lake Michigan and the Chicago metropolitan area.

Finally, the three counties in the Northern Indiana Region are home to more than 40,000 higher education students (figure 4), with another 10,000 students in the surrounding counties. Students are recruited to the area each year from throughout the region, United States and international locations. This creates a unique opportunity to engage this talent and recruit them for long-term opportunities in the region.

Although the region is attracting a variety of people, Northern Indiana's population growth is expected to slow and/or decline over the coming decades. Between now and 2040, Northern Indiana's population growth rate is expected to both decline and be lower compared to the state and the United States.

FIGURE 4

### ENROLLMENT AT NORTHERN INDIANA REGION INSTITUTIONS OF HIGHER EDUCATION

INSTITUTION	POPULATION	TOTAL ENROLLMENT
1 IVY TECH COMMUNITY COLLEGE	SOUTH BEND, ELKHART, & WARSAW	15,000
2 NOTRE DAME	NOTRE DAME	12,004
3 INDIANA UNIVERSITY OF SOUTH BEND	SOUTH BEND	8,490
4 BETHEL COLLEGE	MISHAWAKA	1,885
5 SAINT MARY'S COLLEGE	NOTRE DAME	1,469
6 GOSHEN COLLEGE	GOSHEN	893
7 ANCILLA COLLEGE	PLYMOUTH	700
8 HOLY CROSS COLLEGE	NOTRE DAME	500
8 PURDUE POLYTECHNIC INSTITUTE	SOUTH BEND	150
TOTAL		41,091

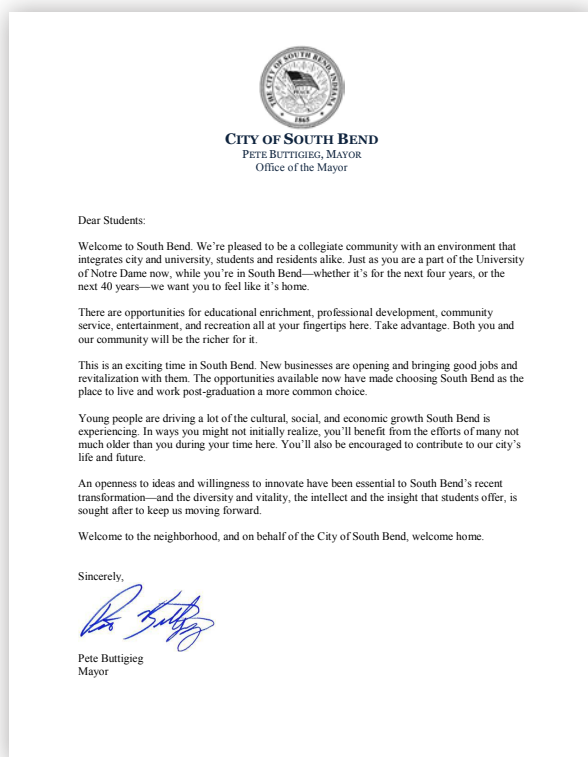
Source: Michiana Partnership



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

Other estimates project that the region will experience population declines and net out-migration over the same period (figure 5). The Urban Institute estimates that the region (defined as the South Bend commuting area) will experience negative population growth at the rate of 1.04% between 2010 and 2030.<sup>[21]</sup> It is important to note a recent change in trajectory for South Bend, the largest city in the region. South Bend was growing in 2014 population estimates for the third time in the four estimates since the 2010 census. While this is small growth of 100,990 in 2010 to 101,190 in 2014, this is the first period of growth after decades of declining population after the high of 132,445 in 1960.

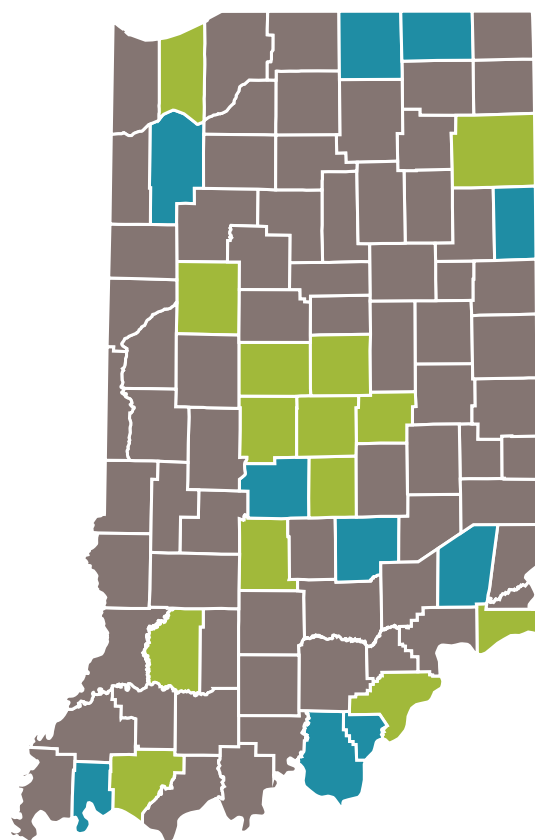
### FOCUS ON RETAINING UNIVERSITY TALENT



(Exhibit C-1)

FIGURE 5

### ESTIMATED CHANGES IN AGE 25-64 POPULATION 2010-2040



#### % Change in workforce 2010 to 2040

Growing

Neutral

Declining

Source: STATS Indiana using data from Indiana Business Research Center

<sup>[21]</sup> <http://datatools.urban.org/features/mapping-americas-futures>

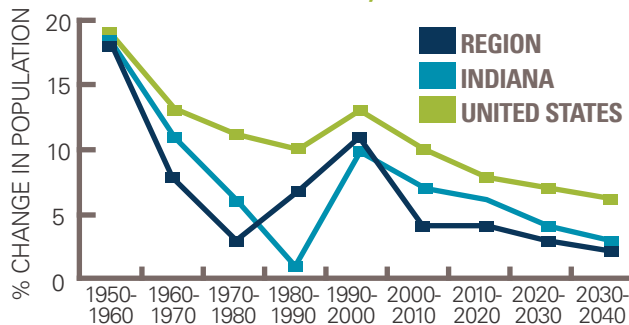


## CURRENT STATE OF THE REGION & QUALITY OF PLACE

The region's aging population will also impact the sustainability of the local workforce as older workers retire and a limited number of younger workers are available to succeed them. The median age in Northern Indiana is expected to increase from 36.6 in 2010 to 38.9 in 2030, with limited and/or declining growth in population cohorts within prime working age (figure 5, 7, 8 & 9).

FIGURE 6

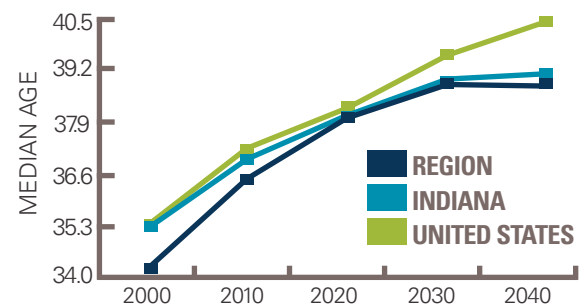
### REGIONAL, STATE, & NATIONAL POPULATION GROWTH RATES, 1950 - 2040



Source: U.S. Census Bureau and Indiana Business Research Center

FIGURE 7

### REGIONAL, STATE, & NATIONAL MEDIAN AGE, 2000 - 2040



Source: U.S. Census Bureau and Indiana Business Research Center

FIGURE 8

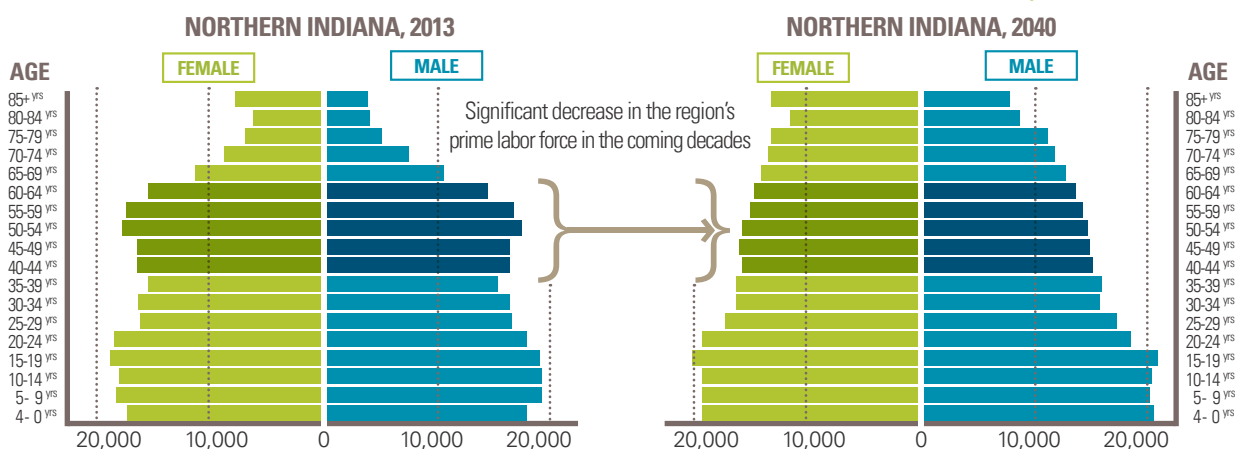
### REGIONAL, STATE, AND NATIONAL MEDIAN AGE, 2000—2040

LOCATION	2000	2010	2020	2030	2040
ELKHART COUNTY	33.0	35.0	35.9	36.5	36.4
MARSHALL COUNTY	35.5	38.5	40.8	41.9	42.1
ST. JOSEPH COUNTY	34.5	36.3	37.5	38.4	38.2
RCNI REGION	34.3	36.6	38.1	38.9	38.9
INDIANA	35.3	37.0	38.1	38.8	39.1
UNITED STATES	35.3	37.2	38.3	39.6	40.4

Source: U.S. Census Bureau and Indiana Business Research Center

FIGURE 9

### NORTHERN INDIANA REGION POPULATION AGE DISTRIBUTION, 2013 & 2040



Source: U.S. Census Bureau and Indiana Business Research Center



## CURRENT STATE OF THE REGION & QUALITY OF PLACE



### Connectivity

Physical, communications, and social networks connect Northern Indiana both internally and externally. Increased connectivity in all of these areas is needed in order to better position the region for the global knowledge-based economy.

#### PHYSICAL CONNECTIONS

Given its central Midwest location and proximity to Chicago, Detroit, and Indianapolis, the region enables access to major cities, markets and customers (figure 10). Residents can drive, fly or take the train to major markets across the country. Businesses can access these areas by a robust infrastructure of international air service, freight trucking and rail.

Three of the nation's most important arteries—Interstates 80, 90 and 94—span the region, linked to U.S. 12, 20, 30 and 31's long stretches of limited access, divided highways. Rail mainlines for CSX, Norfolk Southern and Canadian National cross the area, with numerous branch lines, regionals and short lines to link local companies with the nation's

rail network. Passenger rail options include multiple Amtrak lines and stations, along with South Shore commuter rail service between South Bend, Michigan City and downtown Chicago.

The Northern Indiana RDA and the Northwest Indiana RDA are collaborating on a \$276 million inter-regional project to drastically improve the reliability, safety, frequency and trip speed of the South Shore train from Northern Indiana communities to Chicago.

FIGURE 10

### THE CENTRAL LOCATION FOR THE REGIONAL CITIES OF NORTHERN INDIANA



Source: 2012, U.S. Census Bureau



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

The South Shore line provides a distinct opportunity to improve connectivity to Chicago and its world-class economy and amenity base. Increasingly, Northern Indiana residents will seek employment in Chicago, which on average earns 40% more than similar jobs in Northern Indiana. These wages are returned to Indiana and reinvested in the community to purchase homes, goods and services. Furthermore, a faster, more reliable commuter rail connection opens Northern Indiana to new investment by new knowledge-based industries where talent is attracted to low property taxes, superior housing, good schools and other quality of place attributes.

The South Bend International Airport's three air carriers provide nonstop flights to 10 cities with connections worldwide. South Bend International's multi-modal terminal serves over one million air, rail, and bus passengers each year and has a total

annual economic impact on South Bend and surrounding communities in excess of \$1.7 billion.

Public transit services such as Transpo and an Inter-urban Trolley are available in certain parts of the region. Stakeholders are concerned however, that transit connectivity between communities is limited, and where it is available, it is not as convenient as in other cities.

### COMMUNICATIONS CONNECTIONS

A large number of infrastructure systems converge in the region as their routes pass below Lake Michigan. In addition to roadway and power transmission systems, this convergence includes many North American fiber optic long-haul carriers. In fact, St. Joseph County has what is believed to be the largest concentrations of fiber optic long-haul carriers in the United States all centrally managed through Union Station Technology Center.

**The South Shore line provides a distinct opportunity to improve connectivity to Chicago and its world-class economy and amenity base**

A major private not-for-profit dark fiber network, St. Joe Valley Metronet<sup>[22]</sup> provides direct connection opportunities for area businesses.

<sup>[22]</sup> <http://stjoevalleymetronet.org>



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

This region, through the Metronet, has taken steps to overcome what would normally be an impediment to the development of major data-centric businesses, namely the lack of direct access to multiple carriers. The network consists of over 150 miles of single-mode fiber, deployed in connected, redundant loops, developed in a ringed network for highly-reliable redundancy. The Metronet currently provides innovative services to 180 subscribers in both St. Joseph and Marshall counties. One of the key projects going forward is to expand services throughout these counties and increase them in Marshall County and Elkhart County. The initial development of this private network, and subsequent expansions are funded by private sector companies who are the largest users of broadband connectivity.

Many of the fiber lines converge in Downtown South Bend, near the former Union Station train terminal. There has been significant investment into this area, through projects such as Ignition Park and the Renaissance District. The terminal itself, has been redeveloped into the Union Station Technology Center, Indiana's second largest carrier hotel and a top 40 carrier hotel nationally<sup>[23]</sup>. Through such facilities, the region has direct digital connections to major areas such as Chicago, Indianapolis and St. Louis. Some parts of the region however, do not have high-speed internet that is standard in other communities in

the region and throughout the United States. Major redevelopment is planned for this building and others in the Renaissance District, as further outlined in the project summary.

Ignition Park sits on the grounds of the former Studebaker Corp., the legendary auto manufacturer that was the economic and innovative backbone of South Bend until closing its doors in 1963. Since 2000, old abandoned buildings on the Ignition Park site have been demolished in the state's most aggressive brownfield reclamation effort to make way for a high-tech manufacturing, commercialization and office complex of buildings arrayed in a parklike environment. The technology park is one of the two locations in South Bend that make up Indiana's first two-site State-Certified Technology Park, which was forged through the City of South Bend's partnership with the University of Notre Dame, local economic development groups and the state of Indiana. The other is Innovation Park at Notre Dame, located on 12 acres on the city's northeast side across from the Notre Dame campus.

### SOCIAL AND ORGANIZATIONAL CONNECTIONS

Connecting employers with high-value talent is another area of both opportunity and concern. Employers continue to express the need to attract and connect with highly skilled workers.

<sup>[23]</sup> <http://www.global-access.us/>



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

There are a number of active social networking groups, such as young professional networks, throughout the region. Yet stakeholders, particularly younger people and young professionals, would like to see more cross-regional networking opportunities and increased awareness of entertainment and cultural events occurring in the region.

Regional planning, promotion and development organizations exist and are active members of broader coalitions of organizations. Regional coordination of promoting and developing Northern Indiana was noted as an opportunity for improvement, however. Stakeholders noted that economic development boards

are not as “well linked” as they could be to collaboratively market the region, both internally and externally.

Finally, there are a number of community development organizations throughout the region that connect residents across the socioeconomic spectrum to resources and programs to help them succeed and prosper. Regional stakeholders continue their work to ensure that all members of the community—immigrants, middle class and youth—are involved in civic life and have access to good jobs and career opportunities. This is especially important as the region’s demographic make-up continues to shift toward a more diverse population.

FIGURE 11

### 2012 COST OF LIVING INDEX (COLI)

INDEX VALUE REPRESENTS  
A PERCENT OF THE NATIONAL AVERAGE

LOCATION	COLI
ELKHART - GOSHEN, IN	94.0
SOUTH BEND, IN	91.9
NATIONAL AVERAGE	100.0

Source: Council for Community and Economic Research, ACCRA Cost on Living Index, (copyright).

FIGURE 12

### STATE CORPORATION INCOME TAX RATES – 2015

STATE	TAX RATE (%)	NOTES
INDIANA	7.00	Scheduled to decrease to 6.5% on July 1, 2015
ILLINOIS	7.75	
KANSAS	4.00	Also levies a 3.0% surtax on taxable income over \$50,000
KENTUCKY	4.0-6.0	
MICHIGAN	6.00	
MISSOURI	6.25	50% of the federal income tax is deductible
OHIO	—	Imposes Commercial Activity Tax (CAT) equal to \$150 for gross receipts issued to Ohio of between \$150,000 and \$1 million, plus 0.26% of gross receipts over \$1 million
PENNSYLVANIA	9.99	
TENNESSEE	6.50	
WISCONSIN	7.90	

Source: Federation of Tax Administrators — February 2015



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

FIGURE 13

### 2015 PERSONAL INCOME TAX RATES

LOCATION	TAX TYPE	RESIDENT RATE	NONRESIDENT RATE
ELKHART COUNTY	County Adjusted Gross Income Tax/ County Economic Development Income Tax	2.00	0.5000
MARSHALL COUNTY	County Adjusted Gross Income Tax	1.25	0.2500
ST. JOSEPH COUNTY	County Option Income Tax/ County Economic Development Income Tax	1.75	0.7375
STATE OF INDIANA	Adjusted Gross Income Tax	3.30	N/A

Source: State of Indiana Department of Revenue



## Amenities

Northern Indiana offers residents and businesses a variety of recreational and cultural amenities in addition to a low cost of living, low energy and water costs, a favorable tax climate and a variety of housing and facilities from which to choose. Amenities such as downtown housing and expanded retail entertainment options are needed in the region in order to retain and attract talent and residents. While new mixed-use developments have been developed in recent years, such as Eddy Street Commons on the edge of the Notre Dame campus, the region will be challenged to fund and invest in future amenities and programs if the region's population and labor force declines and ages.

Northern Indiana residents have access to regional and local amenities such as Lake Michigan beaches, bike trails, a burgeoning local culinary scene, minor league baseball, theaters and a zoo, not to mention the cultural, sporting and community activities that the region's higher education institutions provide. Historical industrial buildings being redeveloped throughout the region will create an exciting and unique setting for the region's up-and-coming Innovation Districts and urban housing. Cities such as South Bend, Mishawaka, Plymouth, Goshen, and Elkhart have riverfronts and water amenities that can become urban attractions.

FIGURE 14

### 2015 PROPERTY TAX RATES

LOCATION	HIGHEST	LOWEST	MEDIAN
ELKHART COUNTY	4.5357	1.5894	2.79
MARSHALL COUNTY	3.2440	0.9453	1.51
ST. JOSEPH COUNTY	5.9952	1.8841	2.94
STATE OF INDIANA	6.7739	0.7644	1.89

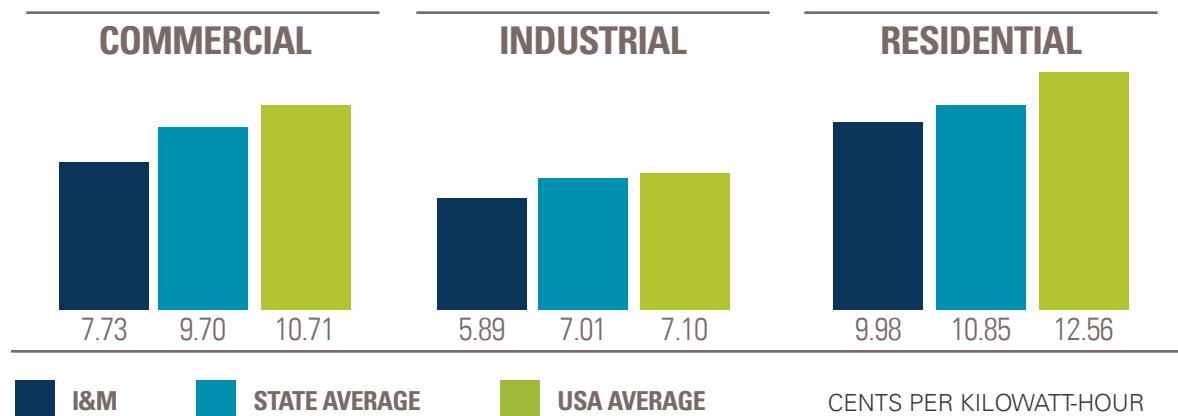
Source: STATS Indiana, using Indiana Department of Local Government Finance data



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

FIGURE 15

### NORTHERN INDIANA ENERGY RATES COMPARED TO STATE AND NATIONAL AVERAGES



Source: EEI Typical Bills Average Rates Report Summer 2014

For example, by installing and connecting parks and trails along waterfronts, these amenities will enhance the urban experience and will connect residents to the more rural parts of the region. The region's distinct urban areas are surrounded by suburban and rural environments, thus providing a full range of residential options for current and prospective residents. Given the region's close proximity to major metropolitan areas such as Chicago and Indianapolis, families can easily access big-city entertainment and amenities while still enjoying a convenient and affordable lifestyle in Northern Indiana.

South Bend/Mishawaka and Elkhart/Goshen; the two largest urban areas in the region, have lower than average costs of

living compared to urban areas across the United States (figure 11). The region's tax rates are also competitive, particularly in comparison to state rates and other parts of the United States (figure 12, 13 & 14).

These factors are important to businesses and households seeking to maximize their financial resources.

Businesses have access to energy, natural and water utilities at competitive rates, which is especially important for energy-intensive industries such as high-tech manufacturing (figure 15). Businesses and trade groups also recognize the availability of corporate facilities in Northern Indiana.



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

The Elkhart/Goshen metro area placed third this year in *Site Selection* magazine's Governor's Cup rankings for new and expanded corporate facilities in places with less than 200,000 people. In 2014, Elkhart County had 12 corporate facilities that met *Site Selection's* criteria of involving at least a \$1 million investment, creating 20 new jobs, or adding at least 20,000 square feet of space.<sup>[24]</sup>

Community members and leaders recognize the need for additional investment in downtown housing and amenities. For example, a 2013 study of the downtown South Bend residential market, estimated demand for approximately 1,525 new housing units in downtown South Bend (Figure 16).<sup>[25]</sup> While financing programs can incentivize some of this development, stakeholders also recognize the need for

population growth in order to attract and sustain private-sector-led investments in these facilities.

Northern Indiana will be challenged to publicly finance future educational, transportation and recreational facilities and services if the region's population and workforce trends continue on their current trajectory. In addition to a projected reduced labor force, by 2040, the largest population groups will be under the age of 20, and the population 75 years and older will double. These younger and older cohorts regularly receive public support for schooling, transportation, recreational services and similar activities. A larger labor force, particularly one earning higher wages, is required in order to provide the tax revenues to fund these necessary programs.

FIGURE 16

### POTENTIAL MARKET FOR NEW HOUSING UNITS DOWNTOWN SOUTH BEND City of South Bend, St. Joseph County, Indiana

HOUSING TYPE	# OF HOUSEHOLDS	% OF TOTAL
Multi-family for-rent (Lofts/apartments, leaseholder)	655	43.0%
Multi-family for-sale (lofts/apartments, condo/co-op ownership)	140	9.2%
Single-family attached for-sale (townhouses/rowhouses, free-simple/condominium ownership)	220	14.4%
Low-range single-family detached (houses, free-simple ownership)	185	12.1%
Mid-range single-family detached (houses, free-simple ownership)	180	11.8%
High-range single-family detached (houses, free-simple ownership)	145	9.5%
<b>TOTAL</b>	<b>1,525</b>	<b>100.0%</b>

Source: Zimmerman/Volk Associates, Inc., 2013

[24] <http://www.elkhartcountybiz.com/category/press-release/>

[25] Zimmerman/Volk Associates, Inc., 2013, An Analysis of Residential Market Potential Downtown South Bend





## Productivity

The region has a concentration of higher education institutions that support regional productivity goals through employment, R&D, workforce development and business development activities.

Northern Indiana's GDP and per capita income growth lags state and national rates, and the region faces a shortage of skilled workers. Northern Indiana's universities and colleges have an important role in the region's innovation and entrepreneurship ecosystem due to their R&D relationships with private sector partners and extensive commercialization activities. These institutions also recognize the importance of community engagement and partnerships with regional constituents. For example, fostering community partnerships and external engagement are components of both the IU South Bend and University of Notre Dame current strategic plans.

These institutions are investing in and achieving these strategic goals. IU South Bend and Notre Dame have invested in housing and mixed-use projects that have improved the quality of life in surrounding neighborhoods and are engaged in scientific discovery and technology commercialization programs. Notre Dame has created an entrepreneurial

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...need to expand our collaboration at home, investing our time and resources with partners in South Bend and the Michiana region to support the area's economic growth, both for the sake of the region itself and its role in making Notre Dame a leading place to teach, learn research, and work.

- Notre Dame Strategic Plan

pipeline including technology transfer, patent support, student internships and training programs. In 2013, Notre Dame started a \$3.5 million Irish Innovation Fund to provide investments in new ventures led by students. Overall, the pace of technology transfer has increased significantly, with the number of patents awarded tripling annually. Between 2007 and 2014, there was a 65% growth in research spending to \$182 million and the number of inventions disclosed by Notre Dame faculty and researchers rose by 35%. During 2014, 108 inventors produced 65 new disclosures, 33 investors were awarded 24 patents, and 13 technologies representing the work of 19 researchers were licensed. These discovery and commercialization programs are supported by major investments from academia, the private sector and public entities in R&D facilities and entrepreneurship programming.



**MAIN BUILDING STAIR RAILING IMPROVEMENTS**  
Start: 6/1/2015  
Finish: 8/1/2015

**MAIN BUILDING EXTERIOR WALL MAINTENANCE**  
Start: 5/8/2015  
Finish: 9/14/2015

**CORBY HALL EXTERIOR WALL MAINTENANCE**  
Start: 5/18/2015  
Finish: 10/30/2015

**LOG CHAPEL EXTERIOR MAINTENANCE**  
Start: 5/30/2015  
Finish: 8/15/2015

**HOWARD HALL SELECTIVE RENOVATION**  
Start: 5/18/2015  
Finish: 8/1/2015

**MORRIS INN KITCHEN EXPANSION**  
Start: 3/15/2015  
Finish: 8/15/2015

**JENKINS HALL & NANOVIC HALL**  
Start: 6/2015  
Finish: 6/2017

**LAFORTUNE HALL ROOF**  
Start: 6/8/2015  
Finish: 8/15/2015

**LAFORTUNE HALL WEST ENTRY RECONSTRUCTION**  
Start: 6/8/2015  
Finish: 8/15/2015

**FLANNER HALL EXTERIOR ENVELOPE MAINTENANCE**  
Start: 5/18/2015  
Finish: 8/15/2015

**TWO NEW RESIDENCE HALLS**  
Start: 3/2015  
Finish: 8/2016

**MCCOURTNEY HALL**  
Start: 8/2014  
Finish: 8/2016

**EAST QUAD GEOTHERMAL WELL FIELD & LANDSCAPING**  
Start: Fall 2015  
Finish: 8/2016

**FITZPATRICK SOUTH BASEMENT WATERPROOFING**  
Start: 5/18/2015  
Finish: 8/15/2015

**CAMPUS CROSSROADS PROJECT**  
Start: 12/24/2014  
Finish: 8/2017

**TRACK & FIELD STADIUM**  
Start: 12/1/2015  
Finish: 12/1/2016

**SOIL REPLACEMENT & STOCKPILE**  
Start: 12/2014  
Finish: 6/2016

For example, Notre Dame, in partnership with private and public organizations, is developing a \$36 million Turbomachinery Laboratory in Ignition Park on the edge of Downtown South Bend and adjacent to the Renaissance District. This facility will be “the nation’s foremost research and test facility for advancing the technology used in the massive gas turbine engines used by commercial and military aircraft, power plants and the oil and gas industry.”<sup>[26]</sup>

General Electric has committed \$13.5 million to fund research and testing at the facility and local organizations, including the City of South Bend and AEP/Indiana Michigan Power partnered to expeditiously install a new 138kV electrical substation that can serve the facility and support the expansion and attraction of technology-driven businesses in the Park by offering the additional capacity and alternate feed capabilities that industries and businesses

REGIONALCITIESOFNORTHERNINDIANA.ORG | 37



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**Over 40,000 students are attending these institutions; and we are developing the necessary innovation district ecosystem that will enable them to stay after graduation.**

- *enFocus*

are seeking, as well as being prepared to accommodate their needs at the “speed of business.” The location of the Notre Dame Turbomachinery Laboratory within Ignition Park creates additional density in a growing Innovation District and aligns with the Innovation District practice of anchor institutions strategically locating key facilities in advantageous areas.

It cannot be emphasized enough that the entrepreneurial and cohesive community partnership between the City of South Bend, Notre Dame, Great Lakes Capital and AEP/I&M leadership contributed significantly to securing this opportunity and improving the landscape for future development in this area. It also sent a signal of the power of collaboration and a renewed commitment to advancing the asset base in order to attract business and talent and capture a viable return on the investment made.

In part due to the benefit provided by the substation, a 28-acre site within Ignition Park is in the final stages of being designated as a Data Center Certified site by Biggins, Lacy

and Shapiro (BLS) and its partner Sugarloaf.

Another example is in Innovation Park, which has become a hub of entrepreneurial energy for the University of Notre Dame and community since it opened in 2009. Innovation Park at Notre

Dame cultivates marketable innovations in an inspiring environment, with access to Notre Dame cutting-edge research, world-class faculty and students, and the global network of Notre Dame entrepreneurial veterans. In simple terms, Innovation Park CONNECTS aspiring entrepreneurs with ND faculty, students and other resources to COLLABORATE with Notre Dame industry experts to COMMERCIALIZE the new venture successfully. This 55,000 square-foot facility is 97% full and looking to expand. Nearly 80 tenant companies could spiral into hundreds of local jobs. Four successful ventures—Vennli, F Cubed, Nexus RV and Data Realty—have already created more than 200 jobs in the region.

#### **BRAIN RETAIN => BRAIN GAIN**

These schools are also partners in workforce and business development efforts since they provide training opportunities for the local labor force, and they coordinate broad networks of alumni and leaders who may consider investing in the region. They offer a solution to Indiana’s chronic problem of net out-migration of college graduates.



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

Today, Indiana cultivates the 14<sup>th</sup> highest number of graduates in the U.S., but is 48<sup>th</sup> in keeping them here. Northern Indiana, with 40,000 college students, is in a unique position to reverse this trend. In the emerging knowledge economy, human capital helps determine the speed and success of communities in adapting to new opportunities. This region needs people with the skills to thrive in this technological environment. The colleges and universities in Northern Indiana, including Notre Dame, Saint Mary's, Holy Cross College, IU South Bend, Bethel College, Goshen College, Ancilla College and Ivy Tech Community College, provide their students and employees with opportunities to develop their talents, and through this education

and training, these institutions of higher learning are helping to build a workforce for the new economy. Over 40,000 students are attending these institutions; and we are developing the necessary innovation district ecosystem that will enable them to stay after graduation.

In the past decade, Notre Dame, with financial support from the Lilly Endowment, partnered with the City of South Bend, St. Joseph County and many Indiana corporations to implement supportive strategies to reverse the outgoing tide of migration of its graduates and those of other Indiana colleges. The desired result is an increase in the percentage of Indiana citizens with high levels of educational attainment and careers that reward that talent. Experience and independent research has demonstrated that the root of the net outmigration problem is a lack of career opportunities for young professionals, not their lack of preparedness or awareness.

**The enFocus Solution:** Leaders of Notre Dame's Engineering, Science, Technology, Entrepreneurship Excellence Master's (ESTEEM) Program collaborated with South Bend community leaders to establish enFocus, a separate 501c3 organization, to help existing companies grow, support the founding of new companies, and create high-level careers in the community.

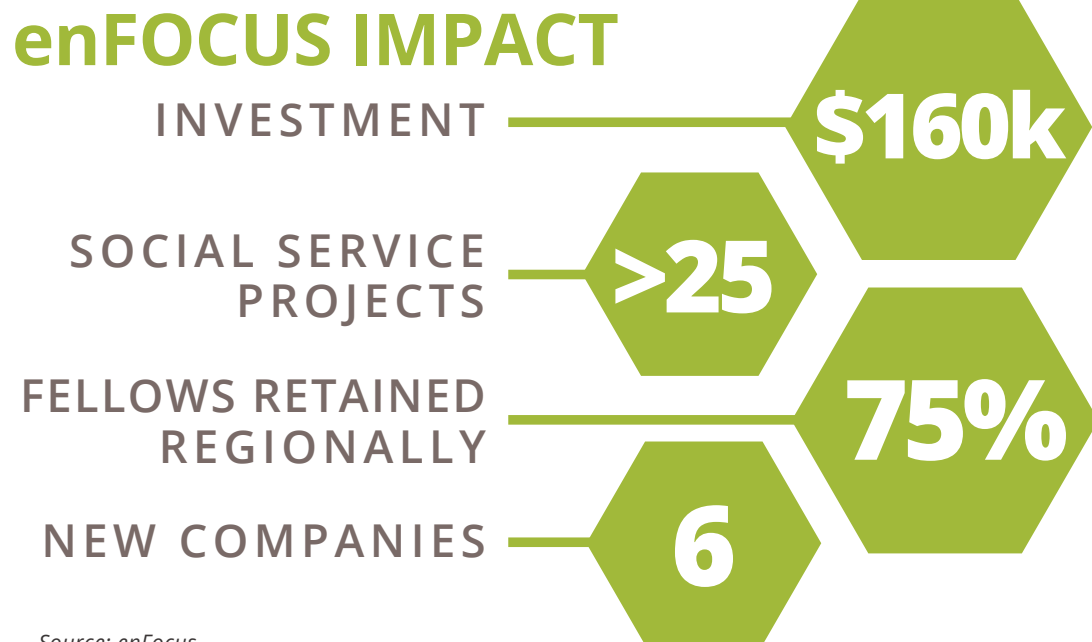
“  
enFocus projects more  
than 245 new career  
opportunities to be  
created within five  
years as a result of  
these early actions.

- enFocus



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

FIGURE 17



Source: enFocus

enFocus deploys a three-pronged “flywheel” model that leverages the following operating activities:

- Retain and develop top talent
- Infuse that talent to build a stronger community
- Spark innovation and entrepreneurship

enFocus recruits recent Indiana college graduates to accept one-year enFocus Fellow positions. enFocus leadership and the Fellows then recruit Indiana college students as interns. Fellows manage a team of interns and work as paid consultants to entities in the South Bend area for 70% of their time to help those clients create and deploy innovations ranging from new

products and services to adjustments in business practices. Fellows are also expected to use 30% of their time to either assist community not-for-profit organizations with similar challenges, or work on kick-starting their own entrepreneurial endeavors. Fellows receive a modest salary and living accommodations close to one another to enable creation of their own collaborative entrepreneurial group. An intended collective effect of these Fellowship and internship components is to encourage and enable Fellows and interns to remain in the Northern Indiana Region and start their own companies or work with local organizations after their Fellowship or internship term is completed (figure 17).



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

### Recent History and the Current State of

**enFocus:** In 2012, the pilot enFocus “hub” was launched in South Bend/St. Joseph County, aided by approximately \$300,000 from eight organizations. Seven Notre Dame ESTEEM graduates declined higher-paying job opportunities elsewhere to stay in the community and work as enFocus Fellows for private, public and non-profit clients. This original cohort delivered tangible results across major industries, including municipality, health care, education, nonprofit and for-profit. Client feedback and testimonials were extremely strong. There was early evidence, therefore, that organizations, recent graduates and donors perceived great promise in the initiative.

Based on the early success and demonstrated potential of enFocus, a \$3 million grant to the University of Notre Dame from The Lilly Endowment in 2013 is enabling enFocus to build out and test its full Fellowship model in South Bend. Their success has paved the way for enFocus hubs to be designed for additional locations across Indiana and beyond. enFocus projects more than 245 new career opportunities to be created within five years as a result of these early actions. Since the Lilly grant award, enFocus has attracted 124 new Fellows, interns and cumulative retentions to only the South Bend site. Fellows have provided millions in value to local organizations in such areas as technology deployment, new business/program development and process improvement, while also retaining

75% of its Fellows in the local economy. Less tangible outcomes are long-term relationships developed by extensive enFocus and Notre Dame collaborations with other colleges, companies and communities.

**Where Do We Go from Here?** enFocus will progressively deploy adaptations of its enFocus South Bend pilot to other communities as scalable, self-sustaining initiatives that turn brain drain into brain retain and, eventually, brain gain. enFocus sees this game-changing initiative bolstering local/regional economies and communities by beginning “at home” in St. Joseph County and spreading virally across Northern Indiana.

enFocus fosters both “intrapreneurship” and “entrepreneurship” in its role as a bridge between the academic community and the surrounding economy. The intrapreneurial facet is expressed through consulting engagements for enFocus Fellows/interns with local businesses, organizations and governmental agencies. The entrepreneurial facet is expressed through the engagement of enFocus Fellows/interns with startup businesses; the expectation is that some of these businesses will be created by the Fellows/interns themselves.

Among the economic development efforts within the control of a community, establishment of new entrepreneurial companies may create the largest number of careers for college graduates. Thus, a



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

new strategy for enFocus to augment its capability to achieve “brain gain” is to expand the entrepreneurial facet of the model as a promising source of new career opportunities.

The ultimate vision of enFocus is to become a force multiplier for regional economic development, creating vibrant ecosystems of innovation and entrepreneurship.

**A Key Role in Attraction:** Finally, institutions of higher education play a key role in resident attraction since they regularly recruit students and faculty to the area and contribute to the region’s quality of life via cultural amenities and community development resources. As Notre Dame’s 2014 Economic Impact study points out, “Beyond the business opportunities and jobs created by the University’s investment in its employees, purchases and facilities,

Notre Dame’s growth enhances its ability to fulfill its mission and its ability to attract employees, students and visitors to a thriving community, and contribute to an improving quality of life in the region.”

**Regional GDP:** Despite development of growth-oriented programs and initiatives, the Northern Indiana regional economy did not grow as fast as the state and the nation between 2001 and 2013. Estimated regional GDP growth between 2001 and 2013 was slower than the state and the nation (figure 18 & 19). The 2013 Northern Indiana regional GDP is estimated at more than \$26 million, representing approximately 8% of the State of Indiana’s GDP.<sup>[27]</sup> Regional per capita income is lower compared to the state and the nation, and declined between 2010 and 2013 while incomes went up in Indiana and the United States (figure 20 ).

FIGURE 18

### 2013 REGIONAL AND STATE GDP (IN MILLIONS)

LOCATION	2013 GDP	% OF STATE GDP
Elkhart County	\$12,042	4%
Marshall County	\$1,747	1%
St. Joseph County	\$13,003	4%
Northern Indiana Region	\$26,792	8%
STATE OF INDIANA	\$317,102	100%

Source: U.S. Bureau of Economic Analysis

FIGURE 19

### ANNUALIZED GDP GROWTH, 2001—2013

LOCATION	GROWTH RATE
Northern Indiana Region	3.39%
INDIANA	3.64%
UNITED STATES	3.90

Source: U.S. Bureau of Economic Analysis

FIGURE 20

### REGIONAL, STATE, AND NATIONAL PER CAPITA INCOME, 2010 AND 2013

LOCATION	2010	2013	CHANGE
Elkhart County	\$22,187	\$21,109	-4.9%
Marshall County	\$22,493	\$21,933	-2.5%
St. Joseph County	\$23,082	\$23,509	1.8%
Northern Indiana Region	\$22,683	\$22,434	-1.1%
INDIANA	\$24,058	\$24,635	2.4%
UNITED STATES	\$27,334	\$28,155	3.0%

Source: U.S. Census Bureau, 2009—2013 5-year American Community Survey; U.S. Census Bureau, 2006—2010 American Community Survey

[27] Estimated based on methodology in Estimating GDP at the Parish (County) Level: An Evaluation of Alternative Approaches (<https://www.lsuagcenter.com/NR/rdonlyres/9CCBBABA-C1D8-454A-A81C-6C5959286A5A/84265/B890EstimatingGDPattheParishLevelJan2012.pdf>)



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

FIGURE 21

### REGIONAL, STATE, & NATIONAL EDUCATIONAL ATTAINMENT

EDUCATION LEVEL	ELKHART COUNTY	MARSHALL COUNTY	ST. JOSEPH COUNTY	NORTHERN INDIANA	INDIANA	UNITED STATES
Less than 9th grade	8%	6%	3%	5%	4%	6%
9th to 12th grade, no diploma	12%	10%	9%	10%	9%	8%
High school graduate or equivalence	37%	42%	32%	35%	35%	28%
Some college, no degree	19%	20%	22%	21%	21%	21%
Bachelor's or Associates degree	18%	17%	23%	21%	22%	26%
Graduate of professional degree	6%	6%	10%	8%	8%	11%

Source: 2008—2012 American Community Survey 5-year Estimates

**Tech Workforce:** Northern Indiana's higher education attainment rates are lower than state and national levels, a data point that may impact the region's ability to attract, retain and grow innovative companies (figure 21). In particular, the region's and the state's limited tech workforce is a barrier to innovation and growth. While Indiana recently performed well overall in the Consumer Electronics Association's 2015 Innovation Scorecard, the state received low marks for its Tech Workforce and Entrepreneurial Activity (figure 22). Businesses will not launch, locate or continue operating in the area if they cannot rely on a pipeline of highly educated or skilled employees. Indeed, some Northern Indiana entrepreneurs report not being able to expand due to limited availability of local talent.

Northern Indiana's burgeoning innovation ecosystem benefits from world-class educational institutions and the state's

business-friendly environment, but without an entrepreneurial tech workforce, the region and the state will fall behind in the global marketplace. This region offers the opportunity to focus on tech workforce and entrepreneurial activity, to bolster the overall attractiveness of the state's innovation ecosystem.

FIGURE 22

### INDIANA'S INNOVATION SCORECARD LETTER GRADES

Right to Work	<b>A+</b>
Welcomes New Business Models	<b>-</b>
Tax Friendliness	<b>B+</b>
Entrepreneurial Activity	<b>D</b>
Fast Internet	<b>B</b>
Tech Workforce	<b>C+</b>
Attracts Investment	<b>B</b>
Grants STEM Degrees	<b>B</b>
Innovation Momentum	<b>B+</b>
Innovation-Friendly Sustainable Policies	<b>—</b>

Source: <http://www.ce.org/scorecard>





## CURRENT STATE OF THE REGION & QUALITY OF PLACE

### Emergence of Innovation Capacity

Many communities throughout Northern Indiana are actively building and leveraging existing high-value innovation resources. Others are actively exploring opportunities in their urban core to foster entrepreneurship, partner with industry and invest in amenities. Some examples from the region include:

- Talent retention initiatives such as enFocus, a talent incubator and social innovation engine based out of the Union Station Technology Center that aims to find bold and innovative solutions that serve regional industries with bright, young entrepreneurial talent. Fellows are retained from local universities for one year to tackle the regional challenges to help bring transformative economic development to communities, shape socially focused startups and create new commercial products or innovations.
- The University of Notre Dame is an unparalleled innovation driver with massive development occurring both on and off campus and increasing connections between the community and Downtown South Bend. “We’re going through the most significant boom in construction we’ve had here in our history”, said Tim Sexton, associate VP for public affairs. Notre Dame has spent an average of \$95 million a year on construction for the past 6 years, will spend an average of \$237 million a year for the next three, an increase of 249%, for a total investment of \$1.281 billion in less than a decade (see map on page 37).
  - Active projects on campus include the Stadium Crossroads Project; McCourtney Hall research building; and two new dormitories, Jenkins Hall and Nanovic Hall.
  - Notre Dame has invested \$625 million in the Northeast Neighborhood since a partnership of the University, City of South Bend, residents and businesses began a revitalization effort.
  - Off-campus investments in projects such as Innovation Park, Eddy Street Commons, and the Robinson Center have fostered partnerships to help spur development, infrastructure improvements and a new private high school in the community. Recently, 42 of 52 new homes in the Eddy Street Triangle Neighborhood have been built and 128 of 185 new nearby condominium units have been sold.



## CURRENT STATE OF THE REGION & QUALITY OF PLACE

- Other University investments include: environmental research at St. Patrick's County Park through the ND-LEEF program, a new boathouse along the St. Joseph River and the Notre Dame Center for Arts and Culture in the downtown museum district.
- Additional off-campus projects under development include the St. Joseph River Hydropower project, the Embassy Suites Hotel (which will complete phase one of Eddy Street Commons), phase two of Eddy Street Commons, expansion of Innovation Park, and phase two of the Overlook apartments.

**Notre Dame has spent an average of \$95 million a year on construction for the past six years and will spend an average of \$237 million a year for the next three, an increase of 249%, for a total investment of \$1.281 billion in less than a decade**

- Downtown South Bend's Innovation District, which encompasses Ignition Park, the Renaissance District/Union Station Technology Center, Ivy Tech Community College, the transportation depot and Four Winds Field for minor league baseball.
- Downtown Goshen, which encompasses co-working spaces, downtown retail and office space, Millrace mixed-use urban housing development and proximity to Goshen College.
- Downtown Mishawaka, which encompasses riverfront enhancements and IronWorks mixed-use redevelopment activities.
- City of Elkhart, which encompasses strengths in robotics and STREAM (Science • Technology • Research • Engineering • Arts/Architecture • Mathematics) education through the Ethos Science Academy and programming enabled by the Horizon Educational Alliance.
- Expansion of Metronet dark fiber to Plymouth in Marshall County and implementation of Project Lead the Way to enhance STREAM education in the K-12 school systems across the region. Each of these key assets and developments have helped inform the overall vision and project alignment for the RCNI plan and investment application.



# VISION & STRATEGY



## VISION & STRATEGY

### A Global Innovation Economy

As a result of the study process and review of the project portfolio, a vision for Northern Indiana emerged. Northern Indiana is a knowledge-driven, highly connected region that serves and provides access to a global innovation economy. We will be recognized for our world-class higher education and community partnerships, superior access and connectivity, and high-performing communities. Northern Indiana is the proud home of Notre Dame, and will become a region of connected innovation hubs.

The region will achieve this vision by creating a formal “Innovation District Network” (figure 22) effectively linking and coordinating high-value regional city assets, development projects and innovation hubs. Specifically, the region will build upon its legacy industry base, technology

knowledge and capabilities, as well as the strengths of institutions of higher education to retain, attract and create new employment opportunities, increase wages and overall productivity. This network will require and bolster place-based investments designed to both retain and attract the talent needed to grow and sustain the region’s economy.

Based on the region’s existing assets, the nature of the projects proposed, and goals expressed by industry, community and private sector leaders, building upon Northern Indiana’s innovation capacity offers a logical approach for sustained economic opportunity.

FIGURE 22

### THE NORTHERN INDIANA INNOVATION DISTRICT NETWORK



Source: Regional Cities of Northern Indiana



## VISION & STRATEGY

For the purposes of the RCNI application, the regional network will consist of innovation hub cities, along with Notre Dame, within Elkhart, St. Joseph and Marshall counties:

- Elkhart
- Goshen
- Mishawaka
- Nappanee
- Notre Dame
- Plymouth
- South Bend

Each hub will have at least one formally defined District (generally the central business district and adjacent neighborhoods) targeted for ongoing investment and programming. Beyond the RCNI application and for broader regional planning purposes, there are several adjacent communities in Kosciusko and LaPorte counties and Southwest Michigan that will link in to the greater innovation ecosystem.

The region will leverage and connect activities and investments within these hubs to create higher-wage jobs; attract, develop and retain talent and residents; and create density in terms of both population and deal-flow from innovation activities. These activities, in turn, will generate more innovation, investment and businesses. This will be achieved by leveraging, developing and connecting regional Innovation Districts; expanding innovation resources to conduct R&D for existing and new regional industries; generating spin-outs, startups

and small business growth; and establishing industry partnerships that will attract or develop headquarters and executive functions within the region. The activities will support the existing manufacturing base to increase efficiencies and provide expansion into new markets.

Northern Indiana's Innovation District Network and quality of place investments will expand upon and link an existing diverse asset base of industry, education, placemaking and economic development organizations, resources, infrastructure and projects (figure 23). By linking these assets and filling gaps with Regional Cities investments, Northern Indiana's formal innovation ecosystem and enhanced community amenities will position the region as a major participant in the global marketplace.

There is a particular objective to further leverage and enhance Northern Indiana's manufacturing base. For instance, there is interest to engage legacy companies such as those within the recreational vehicle (RV) manufacturing sector to determine where new market opportunities and areas to innovate may exist. The ongoing convergence of diverse industry sectors may present opportunities for embedded technologies that are currently unique to the RV industry but could be applied to products or industry sectors. This may be true for other sectors and businesses important to the region.

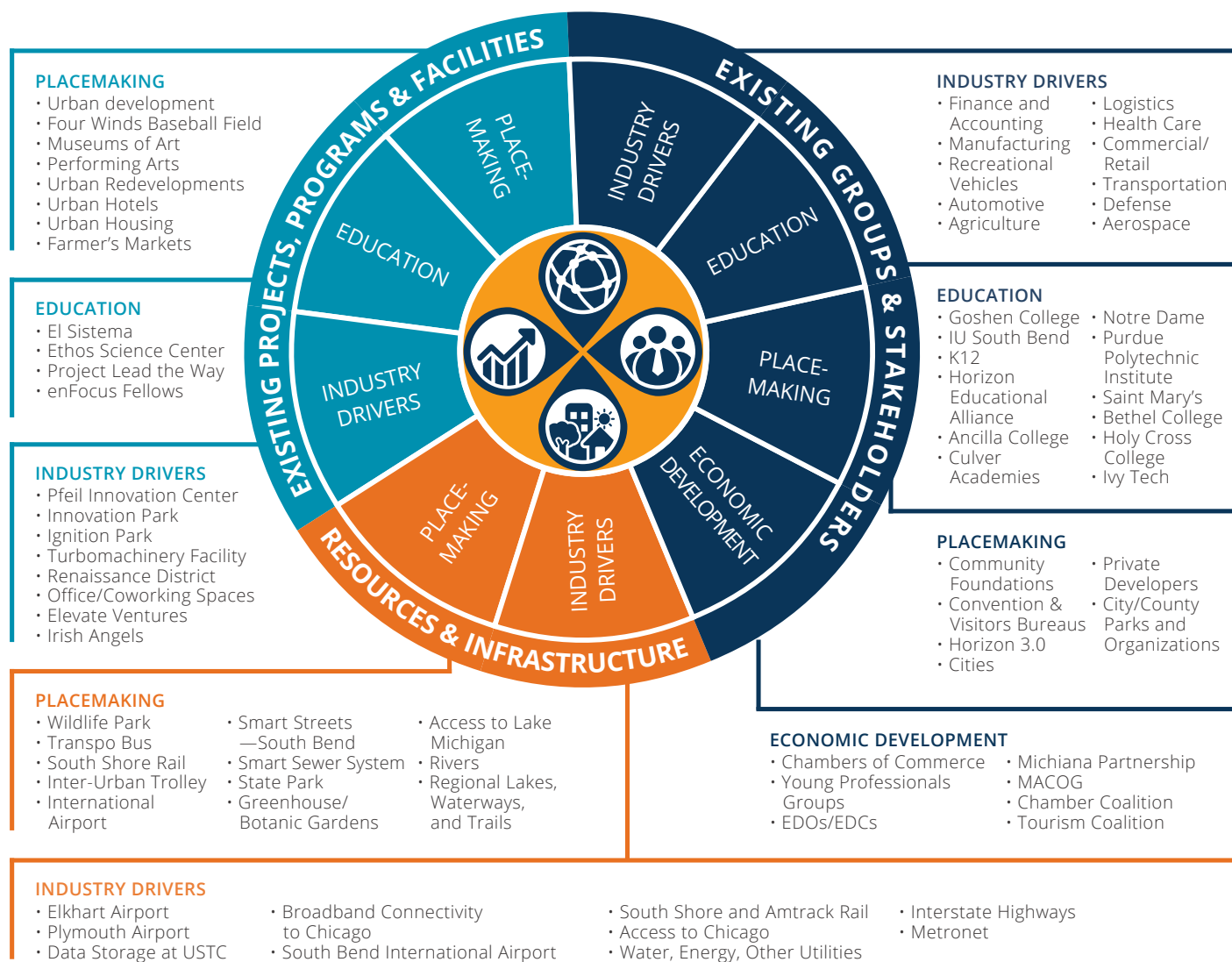


## VISION & STRATEGY

Local manufacturers can also leverage tools such as locally developed supplier IQ<sup>[28]</sup> to identify new customers and suppliers. SupplierIQ is a multi-industry business matchmaking platform, designed to improve sourcing decisions, enhance sales growth and promote regional economic success. These opportunities will also generate growth and innovation. Beyond the initial project portfolio identified as part of the RCI opportunity, it is anticipated that ongoing projects, services and programming will be developed.

FIGURE 23

### NORTHERN INDIANA'S INDUSTRY, EDUCATION, PLACEMAKING & ECONOMIC DEVELOPMENT ASSET MAP



Source: *Regional Cites of Northern Indiana*

[28] <https://www.supplieriq.us/>



# PROJECTS

EXECUTIVE SUMMARY

THE REGION ENGAGED

CURRENT TRENDS

STATE OF THE REGION  
& QUALITY OF PLACE

VISION & STRATEGY

PROJECTS

STAKEHOLDERS, EXECUTION  
& STRUCTURAL CHANGES

BENCHMARKING  
& MEASUREMENT

ADDITIONAL SUPPORT



## Innovate Indiana Projects

Regional Cities of Northern Indiana is advancing 39 projects with a total capital investment of \$703.4 million for RCI review and funding consideration. These projects are designed to enhance assets and close gaps within each hub city while addressing at least one (and often more than one) of the four key success factors discussed earlier. Larger anchor projects, such as the Renaissance District project, are expected to create the needed scale and density that will impact and serve each of the innovation hubs in the short term. The projects identified in this first phase of the proposed RCI portfolio represent foundational investments critical in establishing the Regional Innovation District Network.

An initial list of projects was sourced from MACOG's 2010-2014 Comprehensive Economic Development Strategic Plan, Marshall County's economic development quarterly meetings, Elkhart County's Horizon 3.0 planning process, St. Joseph County Chamber of Commerce plans, municipal comprehensive plans, and multiple studies and analysis completed for RCNI communities and organizations in the past few years. Regional stakeholders and leaders added to this list of projects via interviews, public input sessions and Steering Committee meetings. In total, the region identified more than 600 projects for preliminary consideration.

Through a series of meetings and public input sessions, the Steering Committee and broader stakeholder community filtered this list to 55 potential high-impact projects. Of these projects, 45 formal project applications were submitted via a "public request for project process" conducted online and through public workshops. The Steering Committee prioritized this final set of projects through a qualitative and quantitative review based on:

- Project type
- Readiness
- Timeline
- Budget
- Funding structure
- Anticipated impact
- Alignment with the region's goals of innovation
- Connectivity
- Enhanced quality of place.

The total project portfolio impact is \$120.1 million. This portfolio includes a number of high-impact projects that will enhance the region and spur follow-on investment. In particular, the Renaissance District, including its redevelopment and the tenant projects associated with it, will be a resource for the entire region and is reminiscent of the American Tobacco Development in Durham, N.C. The American Tobacco project significantly altered downtown Durham. In addition to the development of the site itself, this project spurred add-on investments.



## PROJECTS

"The development of American Tobacco, and the significant development following, has changed the landscape of downtown. Increased development has largely been in commercial and mixed-use projects, leading to a more stable and competitive commercial real estate market, as well as increased downtown employment, more business formation and a marked increase in the downtown tax base."<sup>[29]</sup>

In its entirety, the American Tobacco project resulted in more than one million square feet of development, created more than 5,600 permanent and construction jobs, and resulted in a tax value change exceeding 30%.

### There are three project sections

1. Marquee Projects
2. Project Snapshots
3. Full Project List is attached (Exhibit B-4) and includes details on all projects.

## REGIONAL MAP OF MARQUEE PROJECTS



<sup>[29]</sup> [https://www.novoco.com/new\\_markets/resource\\_files/reports/selfhelp\\_casestudy\\_0310.pdf](https://www.novoco.com/new_markets/resource_files/reports/selfhelp_casestudy_0310.pdf), Page 14

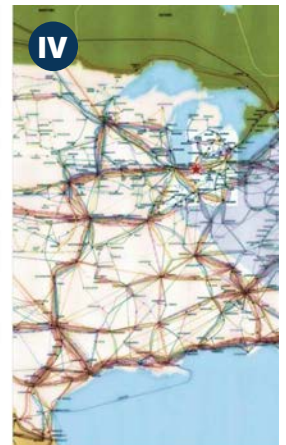


## Marquee Project Summaries

and Connectivity, and High-Performing Communities in which we live and work.

- I.** Innovation District South Bend.
- II.** South Bend Blueways. East Bank Village Development Projects.
- III.** South Shore Train: Connecting Chicago.
- IV.** Metronet Extension.
- V.** Elkhart Market District Blue Zone Initiative.

The summaries highlight the projects' ability to achieve the region's vision of establishing World-Class Higher Education and Community Partnerships, Access







## MARQUEE PROJECT I INNOVATION DISTRICT SOUTH BEND

### Summary

Downtown South Bend's Innovation District is transforming Northern Indiana into a global center for technology companies and technologists. The Innovation District in South Bend is located on the southern edge of downtown and features three distinct attributes, 1) Ignition Park, 2) the Renaissance District, and 3) Four Winds Field. Each element plays an important part in the Innovation District concept and overall.

When considering the Innovation District holistically, the Four Winds Field, located on the north side, is catalyzing a complimentary sports and entertainment district to provide leisure options for the region's increasing workforce. At the heart is an area known as the Renaissance District, which is a collection of former Studebaker facilities, including the former Studebaker Headquarters Building and a former Manufacturing Factory, which is

now poised to become the Midwest's largest mixed-use technology campus through the adaptive reuse of nearly 1.1 million square feet. Directly to the south rests Ignition Park, a 140-acre emerging technology park with several new construction developments underway. Together, these complementary and synergistic areas in South Bend form an anchor Innovation District for the Northern Indiana region.



## INNOVATION DISTRICT SOUTH BEND

The accelerated investment in both adaptive reuse projects and new construction is sparking a true renaissance in our Region. This rebirth in Northern Indiana is inspiring millennials, entrepreneurs and former residents to come, stay and join in the rebuilding of South Bend from yesterday's Rust Belt to tomorrow's Tech Belt. And, it is working! In 2014, after decades of population decline and stagnation, South Bend saw its first population increase. Dilapidated Studebaker buildings that once served as a reminder of South Bend's industrial downturn are now a rallying point for entrepreneurs striving to put South Bend back on the map through technology.

In summary, a group of entrepreneurs and leaders are already transforming our industrial legacy into a bustling hub for high-tech businesses of the future. By further developing a critical mass of economic, physical and networking assets, the Innovation District will generate the vitality needed to transform the regional economy.

The following segments further outline each element and help quantify the potential impact of the Regional Cities Partnership to this already coordinated effort.



## IGNITION PARK

Ignition Park, a budding 140-acre technology, research and manufacturing center built on the old Studebaker grounds, is a key infrastructure component to the Innovation District. Abandoned buildings were demolished in an aggressive brownfield reclamation effort to make way for the high-tech manufacturing, commercialization and office complex. This is one of the locations making up Indiana's first two-site State-Certified Technology Park (the other site is Innovation Park at Notre Dame, see page 38).



## INNOVATION DISTRICT SOUTH BEND

### Significant Milestones in Ignition Park include:

- In fall 2012, Data Realty opened a 50,000 square-foot data center.
- Catalyst One (“one”), opening in 2015, is a 50,000 square-foot multi-tenant building that will offer innovative space for growth-oriented companies. From the early stage through development and fulfillment; “one” is designed to encourage the incubation of ideas and fraternization between like-minded companies. Designed additionally as a meeting place where companies can interact with partners, suppliers, customers and recruits, “one” will offer a café to accommodate around-the-clock work and collaboration. Accompanied by the campus as a whole, “one” will help to stimulate growth and meet the dynamic needs of companies throughout the business cycle, from early stage concepts to a fully integrated facility.
- Catalyst Two (“two”), also opening in 2015, is a 45,000 square-foot building that will house the Notre Dame Turbomachinery Laboratory, a \$36 million partnership between Notre Dame and General Electric. This facility will be the nation’s foremost research and test facility for advancing the technology used in the massive gas turbine engines used by commercial and military aircraft, power



plants and the oil and gas industry. General Electric has committed \$13.5 million to fund research and testing at the facility, while local organizations, including the City of South Bend, Great Lakes Capital and American Electric Power (AEP), have partnered to expeditiously prepare the infrastructure and install a new 138kV electrical substation that will serve the facility and support the expansion and attraction of technology-driven businesses in the Park.

- A 28-acre site within Ignition Park has been designated as a Data Center Certified site by Biggins Lacy & Shapiro.



## INNOVATION DISTRICT SOUTH BEND

The momentum of technology development in the Innovation District has been further catalyzed by the RCNI initiative. Since the project portfolio was completed, executives at Ignition Park-based Data Realty announced plans to develop the \$14.5 million Analytics Center for Excellence (ACE). Leveraging resources within Innovation District, and through a partnership of private sector manufacturers, the City of South Bend, Graham Allen Partners and Data Realty, ACE will provide advanced manufacturing and supply chain analysis specific to a targeted industry cluster within the region.

Advanced manufacturing and supply chain organization are already prevalent in the region. ACE would capitalize on the existing data science work being done by Aunalytics and focus it around using data to make the organizations in our region, and those considering moving here, the most efficient in the world. Data sharing

technology between vendors could drive down costs with deep analysis provided across industries and functions. The result would be that more organizations would look to locate in the region, more students from Notre Dame with advanced degrees in computer science, math and statistical analysis would look to stay here, as would more technical talent from IU South Bend and other schools. The computing need would drive data center usage which creates construction and mechanical related jobs as well. The project would serve entities across the entire region.

It is expected that at least twenty direct jobs will be created, offering average salaries of \$100,000, with hundreds or thousands of jobs possible as a result of the analysis bringing new entities to our region. Further development of the advanced manufacturing industry cluster will spur business attraction and new investment and jobs in related fields.







## RENAISSANCE DISTRICT

### Vision

Aside from its affiliation with the University of Notre Dame, South Bend is perhaps most closely associated with the name Studebaker. The reutilization and reclamation of the remaining Studebaker facilities has united our community by honoring the legacy of the company that built South Bend and embodying the continuity of innovation that began in the mid-1800s when Clem and Henry Studebaker opened their first company near the banks of the St. Joseph River.

Today, Union Station Technology Center (USTC) sits at the center of an area in South Bend known as the Renaissance District which is part of the legacy Studebaker Corridor. From 1928–1971, the building

served as Northern Indiana's commuter rail hub. In those times, physical transportation was the economic engine of the region. In 1979, the building was purchased by Kevin Smith and after 35 years of adaptive reuse, it has become a national presence in the data center and telecommunication industry. Importantly, South Bend is geographically situated along one of North America's richest fiber optic corridors. Over decades of sustained growth, USTC has developed into Indiana's most densely connected building, with over 7,000 points of fiber and 25 national telecommunication carriers, and into the region's largest data center and a top 40 carrier hotel nationally.





Where physical transportation was the economic driver for our region over the past 100 years, digital transportation is the new economic driver for our region and Union Station serves as a symbol of how adaptive reuse can bridge the gap between a community's legacy and its future.

Today, over 300 companies leverage Union Station's data center and telecommunication infrastructure every day. Fueled by the growth of partners such as the University of Notre Dame's Center for Research Computing and several multi-national data center clients, a solid platform for the future economic vitality of our region has been built. Due to the rise of this major technology hub, Cisco Systems named South Bend a *Top 9 Smart+Connected City in the world*. This brand has been strengthened as new companies grow and thrive, including data center providers like Data Realty and fiber optic companies like the St. Joe Valley Metronet.

The stage is now set for the region to accelerate our innovation district's economy.

A short walk or drive from the Central Business District or Ignition Park and within a two miles of the University of Notre Dame, the physical assets within the Renaissance District have been thoughtfully prepared to leverage the area's competitive advantage in power and connectivity. The Renaissance District will create the density and infrastructure needed to support companies, entrepreneurs and innovators who desire to fast track their ideas through the use of technology. This live-work environment will offer commercialization technologies attractive to growing firms and help companies identify new ways to create cutting-edge technologies, products and services for the global marketplace. On-site and neighboring amenities will be attractive to the millennial generation, a demographic of workers needed to support these businesses.



## INNOVATION DISTRICT SOUTH BEND

Much like the American Underground in Durham, North Carolina, the establishment of a game changing set of opportunities to fuel the Innovation District requires a couple of important things:

- 1) A BIG VISION.** Our collective vision for the Renaissance District is to build the *Midwest's Largest Mixed use Technology Campus*, situated on 30 acres, comprised of 1.1 million square feet of real estate, consuming 80 MWs of power and housing over 3,000 technology workers,
- 2) STRONG PARTNERS.** The Regional Cities Initiative will catalyze \$162.7 million of capital investment in facilities and equipment, attract 1,806 new jobs to the district, serve 7,120 students in workforce development capacity and create 2,050 additional jobs throughout our region.
- 3) PERMISSION TO BELIEVE.** A belief that will shape not just the Renaissance District but will serve as a Symbol for our Region's Economic Vitality. Our mission is very simple... To build density of people and density of purpose.

## Project Plan

The project plan consists of phased developments within the Renaissance District, including campus stabilization improvements, Studebaker Factory Buildings 112, 113 and 84, and the Studebaker Administration Building.

### DEVELOPMENTS WITHIN THE RENAISSANCE DISTRICT

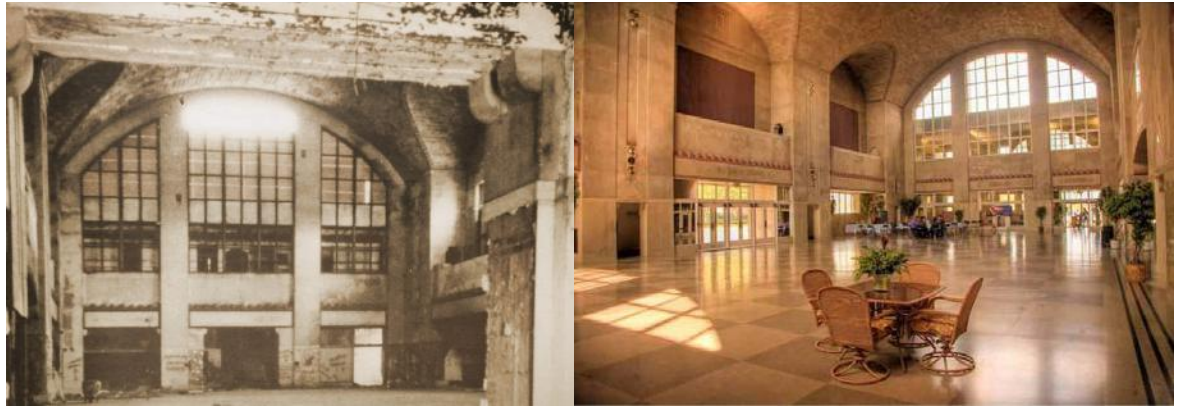
PHASE	PROJECT DESCRIPTION	INVESTMENT	TIMEFRAME
I. Studebaker Campus (ongoing today)	Infrastructure, Environmental Remediation, Stabilize the Complex & Building. Renovation of Building 112 and certain exterior renovations	\$30 million	2014–2016
II. Studebaker Factory No. 113	Building 113 Renovation for co-working, education, retail and multi-tenant office space (includes projects 3,4,5 and 6)	\$13.9 million	2016–2017
III. Studebaker Factory No. 84	Building 84 for use as mixed use technology office and residential space and includes parking structure	\$102 million	2016–2018
IV. Studebaker Administration Building	Administration Building as office space	\$19.8 million	2016–2017
<b>TOTAL INVESTMENT:</b>		<b>\$165.7 million</b>	



## INNOVATION DISTRICT SOUTH BEND

FIGURE 24

### UNION STATION 1979—UNION STATION TODAY



*Union Station: Recipient of the 2013 Indiana Companies to Watch Award*

### STUDEBAKER CAMPUS PHASE I—Ongoing (No RCI Funding Requested)

In 2013, Union Station Technology Center (USTC) purchased the Studebaker Assembly Building as part of a public-private partnership with the City of South Bend to develop the “Renaissance District.” The Renaissance District is a natural extension of the successful adaptive reuse of Union Station, a project performed by visionary serial entrepreneur, Kevin Smith. Union Station has been transformed over time into a technology center and now houses partners like the Notre Dame Center for Research Computing, which have created technology platforms to support other information technology and data centers in the region. Since 2013, USTC (the technology company managing Union Station) has grown rapidly, creating new jobs, attracting new residents and stimulating the local economy. In fact, USTC was named one of the fastest-growing companies in Indiana (figure 24).

While Phase I of the Renaissance District was focused on providing for USTC’s business growth, it is setting the stage for the entire project. To date, the project has attracted Adrian Smith + Gordon Gil Architecture, the internationally-acclaimed architecture firm designing the world’s tallest building, the Burj Khalifa in Dubai and recipient of two 2015 Civic Trust awards for the FKI Tower and Waldorf Astoria Beijing. Additionally, the Renaissance District development project is being led by The Paul Kite Company, a privately held company with a team experienced both in data centric and mixed used projects in Indiana and beyond. The Paul Kite Company has experience in South Bend as the catalysts behind the Eddy Street Commons Project and the Erskine Village Project—the two largest private commercial developments in the City of South Bend.



## INNOVATION DISTRICT SOUTH BEND

Phase I consists of environmental remediation, internal demolition, infrastructure and stabilization improvements for the campus and is currently underway with additional improvements to Building 112, in addition to certain exterior renovations and site improvements.

The total initial investment to stabilize the complex, provide for the expansion of

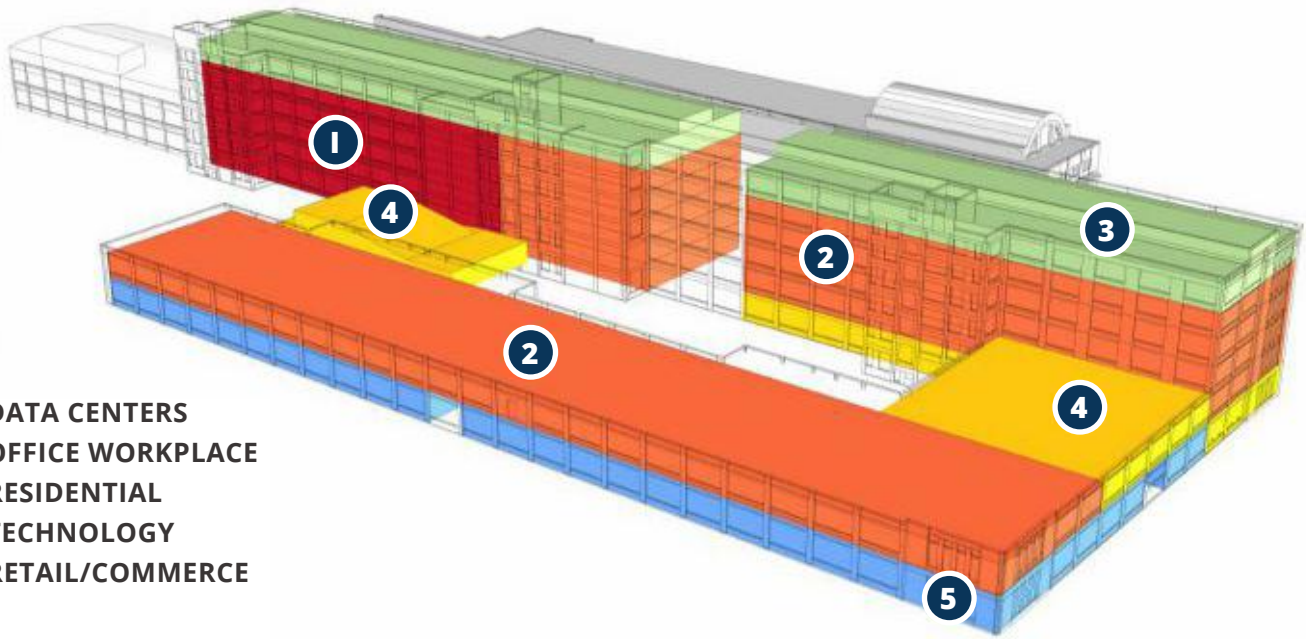
Deluxe Sheet Metal to the facility and enable an initial expansion for USTC will be nearly \$30 million. This will include full renovation and occupation of Building 112 and other exterior, site and core building infrastructure improvements. The City of South Bend and the State of Indiana are working to upgrade the power infrastructure and support facade and stabilization improvements.

### SELECTED PHASE I HIGHLIGHTS:

- Over \$13 million of private capital investment in the Renaissance District in the last 36 months
- Over 30 acres of property and buildings assembled
- Renaissance District organizational directory features 70 private and non-profit organizations
- State of Indiana's largest lead based paint remediation program carried out in former Studebaker complex
- Renaissance District's largest anchor tenant (USTC) has grown over 40% annually for the past five years
- Renaissance District buildings had over 286,000 unique entries in 2014
- Over 6,000 people have engaged in facility tours, innovation meetups, and special events in the past 36 months
- News and media features in high profile outlets such as *Forbes*, *Wall Street Journal*, and *National Public Radio*



## INNOVATION DISTRICT SOUTH BEND



- 1.) DATA CENTERS**
- 2.) OFFICE WORKPLACE**
- 3.) RESIDENTIAL**
- 4.) TECHNOLOGY**
- 5.) RETAIL/COMMERCE**

The above site plan depicts the various platforms for redevelopment of the Renaissance District campus, including uses for data centers (1), office workplace (2), residential (3), technology (4) and retail/commerce (5).

- UNION STATION: Domed structure and attached building in white at top of diagram
- BUILDING 113: 2-story L shaped building on the bottom of the diagram
- BUILDING 112: 2-story structure depicted in white on the left of the diagram
- BUILDING 84: 6-story structure near the top of the diagram

## STUDEBAKER BUILDING 113 (No. 113) PHASE II

Seeking to leverage the platform being built in Renaissance District, a collaborative initiative among multiple education partners provides the investments needed to fully occupy Building No. 113, all with the goal of making South Bend Technologically Relevant.

Although several projects included independent proposals for the RCNI Regional Development Plan, they all plan to co-locate within this building to create a density of entrepreneurship and Science, Technology, Engineering and Mathematics (STEM) programming to promote innovation.





## NO. 113 PROJECTS INCLUDE:

- Indiana University's Health Education Active Learning Lab (HEALL) (#3)
- Purdue University Polytechnic Institute
- South Bend Code School (#6)
- Additive Manufacturing Demonstration & Training Center (#4)
- The STREAM Factory (Michiana Science and Technology Center) (#5)
- St. Joe CEO Program in partnership with Gallup
- enFocus

*\*See Project Snapshots for details on these projects*

Through collaboration, these projects have the potential to both cost-share and maximize their collective impact through uniting into one project. Their cost and impact are discussed collectively herein.

### INVESTMENT SUMMARY

#### STUDEBAKER BUILDING NO.113 • TIMELINE 2016–2017

TOTAL PROJECT COST	\$13.9 MILLION	PERCENT	SOURCE
State Public Funds	\$2.7 million	19%	Northern Indiana RDA
Local Public Funds	\$2.7 million	19%	Various Public Funds
Private Funds	\$8.5 million	62%	Various Private Sources



## INNOVATION DISTRICT SOUTH BEND

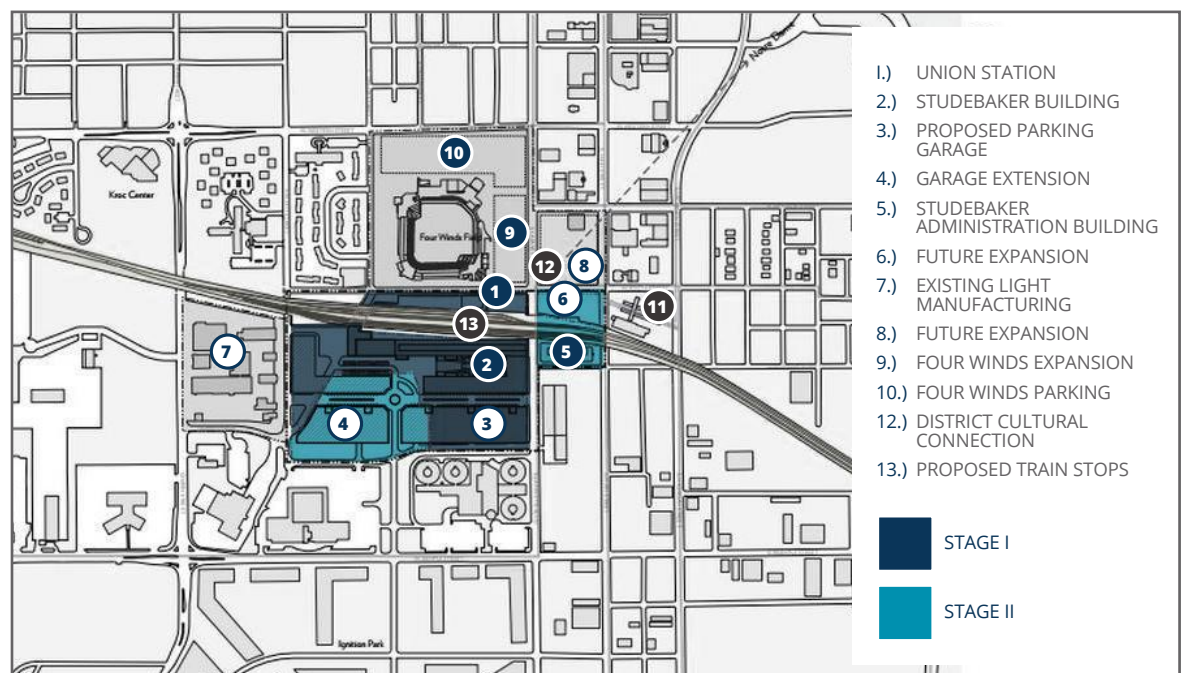
### STUDEBAKER BUILDING 84 – PHASE III

Studebaker Factory redevelopment is a \$102 million project that will provide for reuse of Building 84 as a data center, research, and technology grade office space and residential apartments. The project will adaptively reuse 545,500 square feet, providing a technology hub with a live-work environment for millennials, technologists and researchers. Significant design activities are occurring now. This phase requires structured parking and additional site and infrastructure work, as evidenced in the project application and reflected in the budget below.

#### INVESTMENT SUMMARY

##### STUDEBAKER BUILDING 84 • TIMELINE 2017-2019

TOTAL PROJECT COST	\$102 MILLION	PERCENT	SOURCE
State Public Funds	\$20 million	19%	Northern Indiana RDA
Local Public Funds	\$20 million	19%	City of South Bend
Private Funds	\$62 million	62%	Developer Financing







## STUDEBAKER ADMINISTRATION BUILDING REDEVELOPMENT

The Studebaker Administration Building project is independent, yet under the same ownership of, and adjacent to the Studebaker Factory project. This \$19.8 million project, set to occur in 2015-2016, provides for the reuse of the Studebaker Administration Building as an office space for a technology company. The project will adaptively reuse a vacant 145,500 square feet and enhance the complex to serve as an economic magnet, providing work and retail opportunities conducive for millennials, technologists and professional workers.

### INVESTMENT SUMMARY

#### STUDEBAKER ADMINISTRATION BUILDING • TIMELINE 2016-2017

TOTAL PROJECT COST	\$19.8 MILLION	PERCENT	SOURCE
State Public Funds	\$3.3 million	17%	Northern Indiana RDA
Local Public Funds	\$3.3 million	17%	City of South Bend, TIF, Tax Abatement, Parking Structure
Private Funds	\$13.2 million	67%	Developer Financing



## INNOVATION DISTRICT SOUTH BEND

### Impact: Renaissance District

As one of the largest private developments in the State, the Renaissance District has the potential to transform the economic outlook of Northern Indiana. Upon full completion, the project could attract \$165.7 million in capital investment and 1,806 additional jobs onsite. Further, No. 113, an entrepreneurial and educational collaborative, would serve 7,120 students, facilitate 784 internships and create 2,050 jobs throughout the region. The Renaissance District would become a “node” for not just digital connectivity, but human capital connectivity for the region transitioning to a 21st Century economy.

Of equal importance, the Renaissance District helps create a density of economic activity that leverages Northern Indiana’s higher education assets, like the University

of Notre Dame, IU South Bend and Purdue Polytechnic Institute, to become a visible hub of talent that attracts and then feeds back to the larger region with organizations like enFocus.

For context, per capita income in South Bend is \$19,058. Every 1,000 higher-paying jobs created in the Renaissance District will provide an increase of 3.4% to per capita income, thus providing economic stability and upward mobility to the next generation of area residents. Once developed, the Renaissance District will not only have secondary and tertiary effects locally, but like the American Tobacco Project in Durham, North Carolina, it will serve as an inspiration for future adaptive reuse projects nationally and globally.

#### RENAISSANCE DISTRICT ECONOMIC IMPACT/OUTLOOK

RCI IMPACT (Omits Phase I Impact)	JOBS CREATED (By Year 5)	ANNUAL PAYROLL (By Year 5)	ANNUAL STATE TAXES (By Year 5)	ANTICIPATED TOTAL RETURN ON INVESTMENT (By Year 5)
<b>No. 113</b>	2,050	\$82 million	\$6.1 million	5.0x
<b>Studebaker Building 84</b>	1,366	\$77 million	\$5.5 million	0.62x*
<b>Studebaker Administration Building</b>	440	\$24.2 million	\$1.5 million	1.2x

\*Due to project scale, State recovers full investment by Year 7 and generates at least \$5.5 million every year thereafter.



## INNOVATION DISTRICT SOUTH BEND

### FOUR WINDS FIELD

Significant investment is occurring just north of the Renaissance District. The Four Winds Field ballpark has developed substantially over the past three years, with plans for that transformation to continue outside the stadium walls. Andrew Berlin, Chairman and Chief Executive Officer of Berlin Packaging, Partner of the Chicago Cubs major league baseball team and owner of the South Bend Cubs minor league baseball team, has invested over \$7 million in the ballpark and brought a passion, enthusiasm and vision to the stadium, downtown South Bend and the region.

#### SELECTED HIGHLIGHTS:

- In 2012, \$7 million in renovations at the stadium with additions including a splash pad, outdoor suites and a new team store.
- During that first season under Berlin's ownership, the franchise increased its attendance by 68% over the previous year.
- Through a naming rights negotiation with the Pokagon Band of Potawatomi Indians, the stadium was renamed to Four Winds Field.
- In 2014, the team ended its affiliation with the Arizona Diamondbacks and signed a player development agreement with the Chicago Cubs, changing the team name to the South Bend Cubs.
- Annual attendance continues to climb and break all previous records with 314,000 fans attending Four Winds Field thus far in 2015.
- In 2015, the South Bend Cubs Performance Center opened. This 17,000 square foot facility provides superior training space for team players and community members of all ages who want to enhance their athletic performance.
- Future development will transform four acres of land surrounding Four Winds Field into a "mixed-use" entertainment development. The land has been optioned by Berlin who plans to partner with the City on this development that would stitch Four Winds Field closer to downtown and help create a contiguous developed experience from other assets like the Morris Performing Arts Center and the Renaissance District.





## MARQUEE PROJECT II SOUTH BEND BLUE WAYS. EAST BANK VILLAGE DEVELOPMENT PROJECTS

### Summary

South Bend Blue Ways represents a collection of projects totaling nearly \$65 million of investment concentrated into the East Bank Village, a growing area of downtown South Bend that is well positioned to leverage the St. Joseph River. An investment of \$17.5 million from local public funds will support a series of quality of place improvements along the St. Joseph River, from the South Bend Farmers Market on the east to Seitz Park and the East Race on the west. This will leverage over \$40 million in private development, especially residential uses in the area.

The Armory Regional Culinary Hub and Lofts is an independent project located at the eastern edge of the East Bank Village, anchoring the Market District. This project would increase vibrancy, create additional housing options, support off-campus higher education programming and serve food-related entrepreneurs.



## SOUTH BEND BLUE WAYS. EAST BANK VILLAGE DEVELOPMENT PROJECTS



### Vision

Specific public improvements to the East Bank Trails would include new routing near the residential development at the former Transpo site, adding bicycle/pedestrian connections, removing physical barriers, installing/improving lighting and serving the new Notre Dame boathouse. The trail development would occur in concert with the following private sector projects:

#### SOUTH BEND BLUE WAYS – LEVERAGE THE RIVER INITIATIVE

PROJECT	PROJECT DESCRIPTION	CAPITAL INVESTMENT	TIMEFRAME
1A	<ul style="list-style-type: none"> <li>Riverwalk Upgrades (\$2.5M)</li> <li>Howard Park Improvements (\$10.4M)</li> <li>Cloverleaf Removal (\$2.6M)</li> <li>Sewer Infrastructure (\$4.5M)</li> </ul>	\$20,000,000	2015–2020
1B	Residential Development of the former Transpo site (a brownfield) into 90 units of attached and detached urban housing	\$29,800,000	2015–2020
1C	Construction of the River Race Flats, a mixed-use building containing 8,000 square feet of retail space, 9,000 square feet of office space, and 32 apartment units.	\$7,100,000	Mid 2015–Dec 2016
1D	Notre Dame Boat House	\$3,700,000	Jan 2016–Dec 2018
2	Armory Regional Culinary Hub and Lofts	\$1,730,000	2016–2017
<b>TOTAL INVESTMENT:</b>		<b>\$62,330,000</b>	



## SOUTH BEND BLUE WAYS. EAST BANK VILLAGE DEVELOPMENT PROJECTS



A total investment of nearly \$65 million in capital expenditures will be made in an effort to improve this vibrant and growing East Bank Village neighborhood. The East Bank Village is situated on the southeast side of Downtown South Bend, just a short, pedestrian-friendly walk across the river to the Central Business District and within biking distance to South Bend's Innovation District and the University of Notre Dame. By focusing investment into this urban neighborhood, we are creating a high density of recreational and housing amenities within close proximity to the region's main employment center.

The East Bank Village area of South Bend is an exciting, dynamic and mixed-use urban neighborhood with its own unique identity. Located east of the St. Joseph River and incorporating the historic East Race of the river, the neighborhood is poised for private and public sector investment and development. With North America's first artificial whitewater course and South Bend's first city park, the East Bank Village epitomizes the vitality of an urban downtown neighborhood, offering two historic housing districts and one of the city's most lively and eclectic retail areas.

Historic St. Joseph Catholic Church and School anchor the neighborhood, which is home to some of the most desirable and unique multi-tenant housing options in Northern Indiana.

Through strategic investments and policy decisions, the City of South Bend is actively engaged in supporting development in downtown South Bend. The Blue Ways project sites are all within the Municipal Riverfront Development District, established by the South Bend Common Council to make 3-way liquor licenses available to eligible establishments for \$1,000 as a way to spur development in the urban core near the St. Joseph River. The Common Council is

currently working on an ordinance that will make it easier for food trucks to start up in downtown South Bend. The Blue Ways project sites are within the service area of Downtown South Bend, Inc. (DTSB) – a public/private partnership with the City of South Bend. DTSB will multiply the effects of these investments by further providing beautification, cleanliness, hospitality, safety and event/marketing services to the district.

Recent developments in the East Bank Village include the new St. Joseph High School, East Race Villas, East Bank Townhomes and a 16-unit mixed-use development currently under construction at Hill & Colfax.



## SOUTH BEND BLUE WAYS. EAST BANK VILLAGE DEVELOPMENT PROJECTS

Installed in 2015, the South Bend River Lights are the physical, lasting component of SB150: South Bend's yearlong sesquicentennial celebration. South Bend River Lights is a new public art destination, an interactive display of lights on the St. Joseph River designed by world famous lighting artist, Rob Shakespeare. The display transformed the St. Joseph River into a canvas of living art, with color splashing from two interactive light sculptures on either side of the river, amplifying the majestic cascade of water, joined by a third sculpture highlighting the exquisite "Keeper of the Fire" statue, and symbolically uniting the two sides of the river. Located in the heart of South Bend, near Seitz Park and the Century Center Island, the display serves as an economic development engine, a source of community advancement, a tool for visitor attraction and a destination for recreational, artistic and entertainment delight.

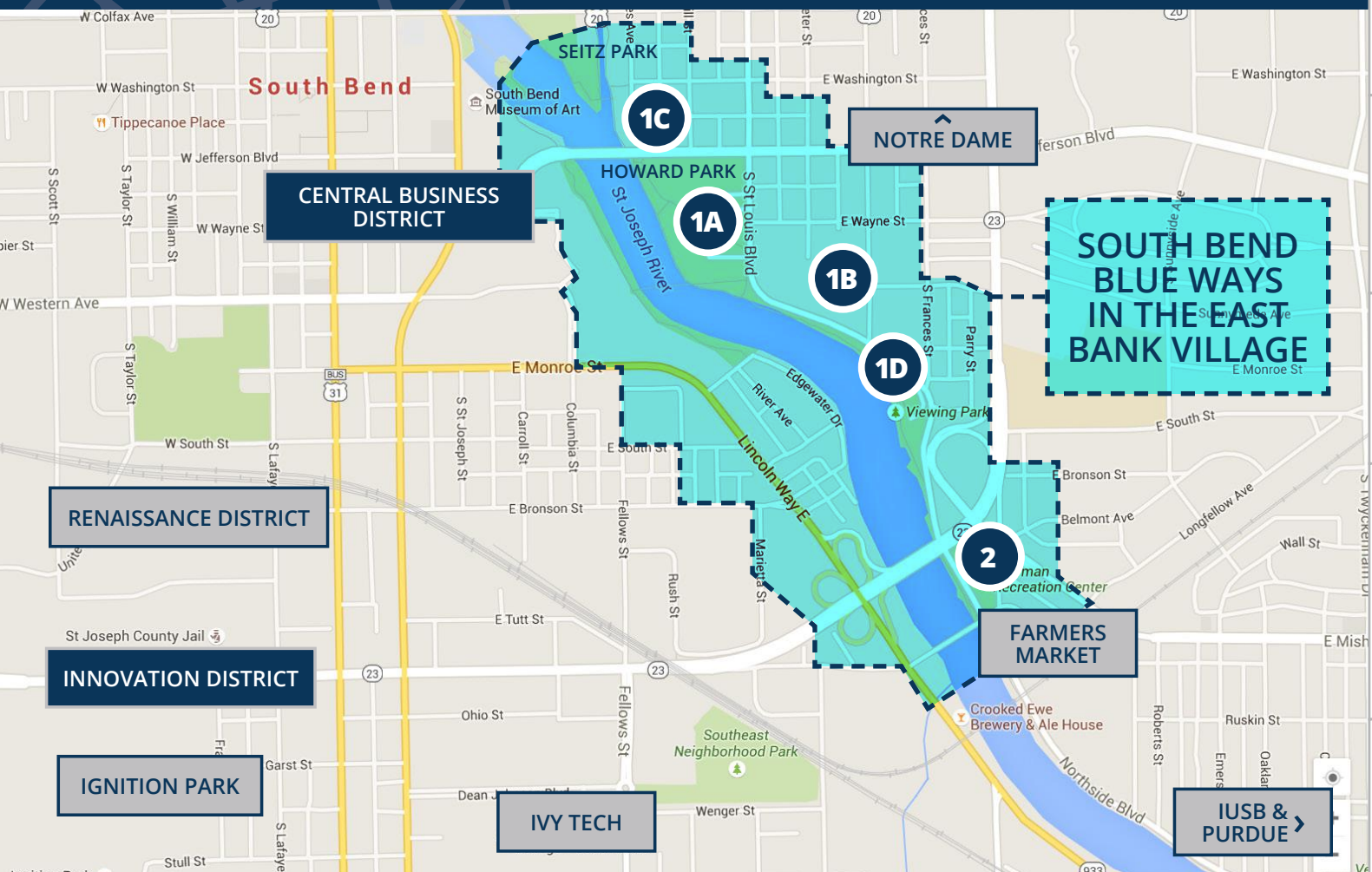
The East Bank Village has something for everyone. "I like how diverse it is," said a Notre Dame graduate student, who moved in three years ago and also works downtown.



"I like the mix of commercial and residential. I love the location. It's bikeable everywhere. You can easily survive in the neighborhood without a car."

The Riverwalk enhancements would apply funds to upgrade portions of the Northside and East Bank Trails; part of the City's Riverwalk system. The City's Riverwalk system is a part of a larger effort to connect the campus' of several key educational institutions; including Saint Mary's College, Holy Cross College, University of Notre Dame, IU South Bend, and Purdue Polytechnic Institute. Park amenities, recreational assets and multiple mixed-use housing developments would be developed all along the St. Joseph River, making this a destination for people seeking an urban lifestyle rich with amenities.





# Project 1 Plan. Blue Ways. East Bank Village Developments

Overall, this nearly \$65 million investment would use coordinated quality of place improvements along the St. Joseph River from the Farmers Market to Seitz Park Downtown to leverage further private development, especially residential uses, in the area around Howard Park.

The South Bend Blue Ways partners include Bike Michiana, Bike the Bend, Century Builders, City of South Bend Community Investment and Redevelopment Commission, City of South Bend Parks and Recreation, City

of South Bend Public Works, Indiana Department of Transportation, Matthews LLC, South Bend Parks Foundation, South Bend Scullers and the University of Notre Dame.

The South Bend Blue Ways Projects began on August 1, 2015 and are expected to be completed by December 31, 2020. Upgrades to the Northside and East Bank trails, which are part of the City's Riverwalk system, are expected to be largely completed by the end of 2016. Supporting infrastructure projects are to be completed in 2016.



## SOUTH BEND BLUE WAYS. EAST BANK VILLAGE DEVELOPMENT PROJECTS

The housing development is being driven entirely by the private sector and much of it is anticipated to be completed by the end of 2018. Ground breaking for the redevelopment of the former Transpo site is set to occur in the fall of 2015 with full buildout by 2020. A 2015 ground breaking is planned for the River Race Flats project, with 2016 occupancy. The Notre Dame Boathouse is already under construction with a spring 2016 completion target.

The overall project, especially its housing components, implements key portions

of the East Bank Village Master Plan and the Howard Park Neighborhood Plan. The trail component is part of the South Bend Bikeways planning map. The Howard Park improvements and cloverleaf ramp removal are both proposed as part of the Howard Park Neighborhood Plan.

Ongoing expenditures for the public components of this project will be similar to the existing expenditures for street, trail and park maintenance in the area.

### PROJECT 1A. BLUE WAYS – HOWARD PARK AMENITIES

This project will upgrade portions of the Northside and East Bank Trails, part of the City's Riverwalk system, adding new routing near the former Transpo site and bicycle/pedestrian connections, removing physical barriers and installing/improving lighting. The Public Investment includes \$2.5 million for Riverwalk Upgrades, \$10.4 million for Howard Park

Improvements, \$2.6 million for Cloverleaf Removal and \$4.5 million for Sewer and Infrastructure Expenses. Riverwalk upgrades will be largely completed by the end of 2016. Supporting infrastructure projects are to be done in 2016.

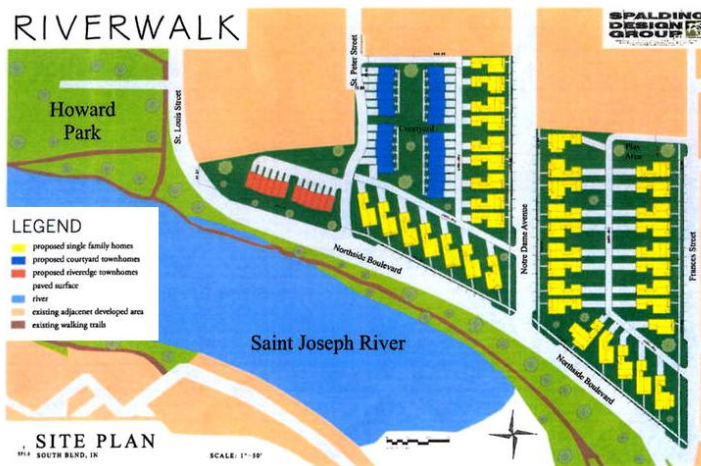
New and renewed amenities to Howard Park will include a community center, ice rink, amphitheater, sand volleyball courts and mini-marina. The South Bend City Council recently approved a \$5.58 million bond to support park improvements, including this project. Removal of the Mishawaka Avenue cloverleaf ramp at Eddy Street will allow a 1960s highway segment within a neighborhood to be eliminated in favor of expanded green and development space along the river.





## SOUTH BEND BLUE WAYS. EAST BANK VILLAGE DEVELOPMENT PROJECTS

### PROJECT 1B. RESIDENTIAL DEVELOPMENT AT FORMER TRANSPPO SITE



David Sieradzki of Century Builders recently purchased the 10-acre former Transpo site on Northside Boulevard along the St. Joseph River. The former brownfield site had served as the county's public bus operator's headquarters for more than 100 years before Transpo relocated to Ignition Park in 2010. Century's project calls for a mix of 39 single-family homes, 22 small town houses, 26 standard town houses and series of small parks, with home prices ranging from \$200,000 to \$500,000.

### PROJECT 1C. RIVER RACE FLATS.

The River Race Flats is a Matthews, LLC proposed mixed-use building in downtown South Bend's East Bank neighborhood that was recently approved for PUD rezoning with a height variance to support increased density on the site. When completed, it will have 9,000+ square feet of 2nd floor office space, 8,000 square feet of ground floor commercial space and 32 luxury residential units. The exterior will be brick and limestone, with gorgeous 14' limestone columns supporting a 2nd floor walkway. In front will be a public plaza, with outdoor seating to enjoy the views of Howard Park and the St. Joseph River.





## SOUTH BEND BLUE WAYS. EAST BANK VILLAGE DEVELOPMENT PROJECTS

### PROJECT 1D. NOTRE DAME BOAT HOUSE

The new \$4.5 million University of Notre Dame Boathouse will be the home of the Women's Varsity Rowing program in addition to providing accommodations for the Men's Club Rowing Team. A total of four boat bays will be located on the lower level of the facility with easy access to the St. Joseph River and will include team warm-up and multi-purpose space on the upper level. Views of the St. Joseph River and Viewing Park recreation area will be enjoyed from the elevated observation deck along the river-facing side of the new Boathouse. The Boathouse project broke ground this spring with completion scheduled for December of 2015.



The South Bend Scullers, a local rowing club, will take over the adjacent old structure and enhance access to the river for the general public.

#### INVESTMENT SUMMARY

##### PROJECTS 1A-1D

TOTAL PROJECT COST	\$62,700,000	PERCENT	SOURCE
State Public Funds	\$2,500,000	4%	Northern Indiana RDA
Local Public Funds	\$17,500,000	29%	South Bend River East Dev Area TIF (\$5.2M); South Bend Parks Bond (\$9.4M); South Bend Sewer Bond (\$2.9M)
Private Funds	\$40,600,000	67%	Real Estate Developers – Matthews LLC (\$7.1M) & Century Builders (\$29.8M); University of Notre Dame (\$3.7M)





## SOUTH BEND BLUE WAYS. EAST BANK VILLAGE DEVELOPMENT PROJECTS

### Project 2 Plan. Armory Regional Culinary Hub

A former National Guard Armory, the century-old building across from the Farmers Market previously served as one of four recreation centers in the city. In need of extensive repairs, it currently serves as a storage facility.

This project includes conversion of the vacant 20,551 square foot building into a thriving urban mixed-use development offering residential rentals and a regional culinary hub. The Armory Lofts will redevelop 12,100 square foot into eight residential rental units. The Armory Kitchen will convert 8,443 square foot into a regional culinary hub, centered around a shared use commercial kitchen for use by food entrepreneurs, acting as a commissary for food truck operators (ordinance going through city council currently) as well as by entrepreneurs to make product in bulk for distribution and who need a space to store, prepare and process their products. This fully equipped workspace

will be open 24/7 and will rent private or shared space as needed to support entrepreneurs. With booming demand for artisanal foods and drinks, shared kitchens can help entrepreneurs get into a licensed kitchen and start a business at a fraction of the traditional start-up costs. Armory Kitchen will also provide a collaborative environment, connecting “foodpreneurs” to each other and to business support and technical assistance with branding, sales and distribution. Additional components to this food hub could include a distillery with a tasting room and classes and educational facilities to serve related programs. The Armory Kitchen will cultivate the kind of food businesses the community wants, through its alumni businesses opening their own brick-and-mortar establishments and adding to the vibrant culinary experience in cities across the region. A multipurpose space will be available for tastings, meetings, training, demonstrations and classes.



## SOUTH BEND BLUE WAYS. EAST BANK VILLAGE DEVELOPMENT PROJECTS

The building sits in the center of the Market District, a burgeoning food area, including the South Bend Farmers Market, Bamber's Superette, the Crooked Ewe Brewery and Ale House and Oh Mammias Italian Deli and Sandwich Shop. It is also in the immediate area of The Brick (bar and event venue), the new Notre Dame Boat House and the Transpo housing development and within walking distance to Downtown South Bend, particularly its growing East Bank Village. The location is just minutes from Ivy Tech Community College, which offers a robust Culinary Arts program with concentrations in Baking and Pastry Arts, Culinary Arts and Restaurant Management and IU South Bend (7,859 students) which is planning a restaurant and hospitality management program. The proposed redevelopment complements and expands upon the existing uses in the neighborhood.

### INVESTMENT SUMMARY

#### ARMORY REGIONAL CULINARY HUB

TOTAL PROJECT COST	\$1,730,000	PERCENT	SOURCE
State Public Funds	\$350,000	20%	Northern Indiana RDA
Local Public Funds	\$350,000	20%	City of South Bend (TIF Infrastructure Support/Tax Abatement)
Private Funds	\$1,030,000	60%	Private Real Estate Developer

## IMPACT OF ARMORY REGIONAL CULINARY HUB

Located in the Market District, the proposed redevelopment complements and expands upon the existing uses in the neighborhood. The location, which is just a few minutes from IU South Bend, Ivy Tech Community College and Goodwill Industries. Partnerships with these institutions will provide anchor tenants for the project and support their hospitality management program, Culinary Arts program and workforce training initiatives, respectively.

The Kitchen will result in the start-up of several food-truck operations and food related businesses.

The project sits within the City of South Bend's Blue Ways project which is identified to focus on the greater East Bank Village, from the Farmers Market on the east to Seitz Park in Downtown South Bend on the west.



## SOUTH BEND BLUE WAYS. EAST BANK VILLAGE DEVELOPMENT PROJECTS



### Collective Impact:

The project will make Howard Park, the adjoining stretch of the St. Joseph River, and the surrounding neighborhoods a destination that draws new residents, supports commercial development, and provides a signature amenity to the region. Over \$40 million in private development could be realized in the next five years.

The path improvements will greatly improve a core section of South Bend's Riverwalk system and serve as a link in the broader, regional Indiana-Michigan River Valley Trail. The Howard Park improvements will make it a jewel in the Parks system and will be a draw to the river, downtown, and the East Bank Village area.

Improvements would be especially attractive to young professionals, eliminating blight and unused highway in favor of residential uses and expanded green and development space along the river.

The project is estimated to add at least \$39 million to the local property tax base. The resulting annual property tax revenue is estimated to be at least \$467,000. Total economic impact for retail operations connected to this project is estimated at \$1.2 million, creating an annual indirect business tax impact of \$117,000, approximately evenly divided to state and local governments. The \$2.5 million Regional Cities investment, then, will increase estimated annual tax revenues (local and state) by about \$584,000. The payback period to break even on this public investment is 4.3 years.

The project will make Howard Park, the adjoining stretch of the St. Joseph River, and the East Bank Village a destination that draws new residents, supports commercial development and provides a signature amenity to the region.





## MARQUEE PROJECT III SOUTH SHORE TRAIN: CONNECTING CHICAGO

South Shore Train: Connecting Chicago is a \$270 million eight year project supported through an active inter-regional collaboration of the Northern Indiana RDA, LaPorte County and the Northwest Indiana RDA. The regions recognize that in working together, they will most efficiently and effectively be able to leverage this asset – by improving the frequency, reliability, and speed of this critical linkage between South Bend and Chicago, and all of the communities in between.

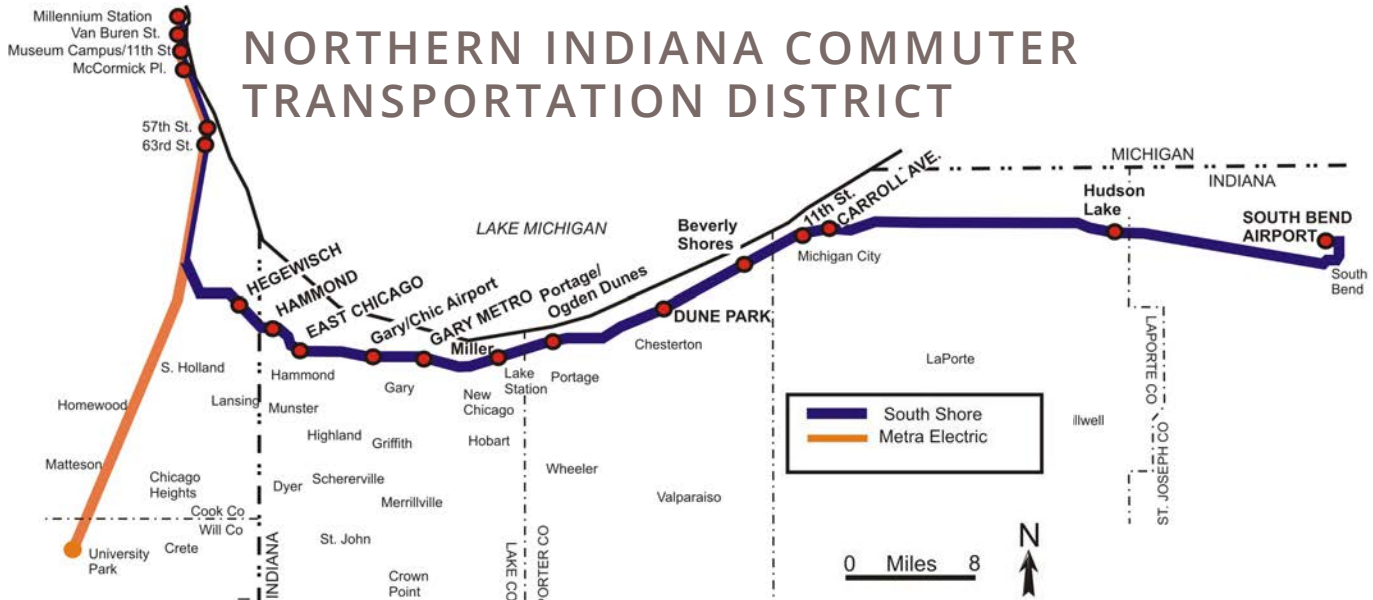
It is vital that we enhance connectivity to the nation's 3rd largest economy, where jobs on average pay 40% more than similar jobs in northern Indiana. This plan will establish Northern Indiana as the newest suburb of Chicago and provide the foundation for competing with Chicago's north and west suburbs.

### Summary

The Northern Indiana Commuter Train District (NICTD) Board adopted a strategic business plan in 2014 identifying a series of infrastructure investments that will significantly reduce travel time to 90 minutes between South Bend and Chicago.

There are four phases to the project, with the line traversing through St. Joseph, LaPorte, Lake, and Porter counties and serving all of the cities and towns within. Phases 1 and 2 are included in the RCNI funding request





### SOUTH SHORE TRAIN: CONNECTING CHICAGO

PROJECT PHASE	PROJECT DESCRIPTION	CAPITAL INVESTMENT	TIMEFRAME
1	Infrastructure Renewal of the line between South Bend and Michigan City	\$31,725,000	2016–2017
2	South Bend Station Realignment at SBN International Airport	\$19,000,000	2017–2018
3	Double tracking between Michigan City and Gary to increase frequency of trains available and reduce the delays	\$110,000,000	2016–2021
4	Michigan City Station Realignment	\$109,000,000	2018–2022
<b>TOTAL INVESTMENT:</b>		<b>\$269,725,000</b>	

## Project Plan

This project is a collaboration of multiple public and private sector organizations, including Northern Indiana Commuter Transit District, Northern Indiana RDA, Northwest Indiana RDA and Michiana Area Council of Governments. Working together, these entities have the ability to generate public and political support and investment to implement the plan.

The project is listed in Northwest Indiana Regional Plan Commission's 2040 Comprehensive Regional Plan and 2014-2017 Transportation Improvement Program, the Michiana Area Council of Governments 2014-2018 Transportation Improvement Program and the FY 2014-2017 Indiana State Transportation Improvement Program.



## SOUTH SHORE TRAIN: CONNECTING CHICAGO

### PHASE ONE (INFRASTRUCTURE RENEWAL FROM SOUTH BEND TO MICHIGAN CITY)

The first phase of the overall project is focused on a series of infrastructure projects which are precursors to making other infrastructure improvements and service enhancements to improve South Bend's connectivity to Chicago. The benefits of this phase include increased safety and reliability and will alleviate the need for intermittent busing passengers of between the South Bend and Michigan City stations.

This project includes the final phase of a multi-year investment to upgrade the last 21 miles of aging overhead power distribution system, upgrade 8.3 track miles of rail from 100# to 115# rail, and extend Birchim Siding with hi-speed turnouts located in eastern LaPorte County by 4,500'. The overhead wire design and hardware dates back to the 1920s and wire failures are the single leading cause of lengthy train delays. The

railroad's remote location between South Bend and Michigan City represents a significant safety concern for passengers, increasing the probability of being stranded in unfavorable weather conditions. The existing rail was manufactured in the early 1900s and is subject to a higher rate of failure due to wear, fatigue and internal flaws. Furthermore, 100# rail and track components are no longer manufactured. Extending Birchim Siding will give the ability to increase South Bend service by providing a longer siding for east and westbound trains to pass at faster speeds.

This project also includes \$1 million to conduct the engineering study in preparation for phase two of the project (South Bend Track Realignment).

#### INVESTMENT SUMMARY

##### SOUTH SHORE PHASE 1 • TIMELINE APRIL 2016–JUNE 2017

TOTAL PROJECT COST	\$31,725,000*	PERCENT	SOURCE
State Public Funds	\$4,758,750	15%	Northern Indiana RDA
Local Public Funds	\$4,608,750	14.53%	NICTD
Other Local Funds	\$150,000	0.47%	Federal TIGER VII grant
Federal Funds	\$22,207,500	70%	Federal TIGER VII grant
Private Funds	0		Offset by other private projects

\*Phases 1 and 2 are included in the RCNI funding request



## SOUTH SHORE TRAIN: CONNECTING CHICAGO



### PHASE TWO (SOUTH BEND TRACK REALIGNMENT):

South Shore trains currently navigate a circuitous reverse “C” in order to access the South Bend International Airport terminal from the east. The route is long and trains are slowed by 23 grade crossings. This realignment project would provide a more direct route to the west side of the airport terminal by eliminating three track miles, reducing travel time by up to ten minutes, and cutting the number of crossings from 23 to 7.

#### INVESTMENT SUMMARY

##### SOUTH SHORE PHASE 2 • TIMELINE 2016–2018

TOTAL PROJECT COST	\$19,000,000*	PERCENT	SOURCE
State Public Funds	\$2,850,000	15%	Northern Indiana RDA
Local Public Funds	\$2,850,000	15%	NICTD
Other Local Funds	\$1,900,000	10%	Federal TIGER VII grant to count as local
Federal Funds	\$11,400,000	60%	Federal TIGER VII grant
Private Funds	0		Offset by \$9.8M other private projects

\* Total project is \$20 million, however \$1 million is being funded with phase one.



## SOUTH SHORE TRAIN: CONNECTING CHICAGO

### PHASE THREE (DOUBLE TRACKING)

The South Shore Line is a double track railroad that shares the right-of-way with the Metra Electric District in Chicago. After the two services diverge, the section of double track extends east, 17.2 miles into Gary. Between Gary and Michigan City (a distance of 25.9 miles) the South Shore is a single track railroad with six miles of double track in eastern Lake County and western Porter County, and several mile-long passing sidings. Constructing continuous double track would increase scheduling flexibility, improve reliability, expand maintenance windows and eliminate the single point of failure that exists with single track operation. The South Shore will remain single-track (with passing sidings) between Michigan City and South Bend, as there is sufficient capacity for existing and anticipated service levels.

#### INVESTMENT SUMMARY

##### SOUTH SHORE PHASE 3 • TIMELINE 2016–JUNE 2021

TOTAL PROJECT COST	\$110,000,000	PERCENT	SOURCE
State Public Funds	\$16,500,000	15%	Northwest IN RDA
Local Public Funds	\$16,500,000	15%	NICTD
Other Local Funds			
Federal Funds	\$77,000,000	70%	Grant TBD by NW IN RDA
Private Funds	0		Offset by other private projects

### PHASE FOUR (MICHIGAN CITY REALIGNMENT)

This project will eliminate two miles of embedded street running track. The project includes the construction of a new exposed ballasted double track railroad within the 10th/11th St. Corridor coupled with a modern, fully equipped consolidated station and eight-car high level boarding platforms. Benefits include a reduction in travel time, improved reliability and operating flexibility.

#### INVESTMENT SUMMARY

##### SOUTH SHORE PHASE 4 • TIMELINE 2018–2022

TOTAL PROJECT COST	\$109,000,000	PERCENT	SOURCE
State Public Funds	\$16,350,000	15%	Northern IN RDA & Northwest IN RDA
Local Public Funds	TBD		NICTD- could make up any gap in other sources
Other Local Funds	\$16,350,000	15%	LaPorte County, Michigan City & LaPorte
Federal Funds	\$76,300,000	70%	Grant TBD, could be local funds
Private Funds			Offset by of other private projects



## SOUTH SHORE TRAIN: CONNECTING CHICAGO



### Impact

This project will improve South Bend's connectivity to Chicago, expose Northern Indiana residents to higher paying jobs, and improve quality of life. Visitors and businesses will also benefit and be attracted to the area due to improved accessibility.

The improvements identified are essential to the continuance of the South Shore rail service between South Bend to Michigan City. Without improvement, NICTD would – at an indeterminable but not far off, time - be forced to terminate service to South Bend. According to an independently contracted Regional Benefits Analysis conducted by Policy Analytics, LLC completed in 2014, the current South Shore service generates \$427 million in personal income for the region (2012 dollars). These economic benefits extend throughout the Northwest and North Central Indiana region.

Ridership models predict that with this investment and others to follow, South Bend ridership has the potential to nearly double from 260,560 annual passengers to over 438,000 passengers by 2033. With an average fare of \$10 we could experience a revenue increase of \$1,774,400 (both directions).





## SOUTH SHORE TRAIN: CONNECTING CHICAGO



Victor Smith  
Secretary of Commerce, State of Indiana  
Indiana Economic Development Corporation  
One North Capitol, Suite 700  
Indianapolis, IN 46204

July 6, 2015

RE: Regional Cities of Northern Indiana and the Northwest Indiana Regional Development Authority

Dear Secretary Smith and Members of the Regional Cities Selection Committee,

Thank you for providing us the opportunity to express our strong support for regional cooperation by championing the Regional Cities applications for the Regional Cities of Northern Indiana and the Northwest Indiana Regional Development Authority (RDA). We are hopeful that La Porte County will avail itself of an opportunity to formally join with the Regional Cities of Northern Indiana in a not too distant future date. In the potential interim absence of any formal collaboration, we, the leaders of the two cities inside La Porte County, wish to communicate both why we are supporting these initiatives and what sets these applications apart.

### **Why we are supporting these initiatives:**

According to STATS Indiana, 66.3% of Hoosiers live in incorporated places and growth in cities and towns accounted for 82.5% of Indiana's population growth in 2014. Census data shows that housing and family reasons are the top two drivers for why Americans move, with job related reasons coming in a distant third. Within these categories we learn that citizens are looking for better housing and school districts, they're looking for lower crime and proximity to family as well as shorter commute times to work. Time and again Local Economic Development Office (LEDO) representatives are charged with providing prospective industry leaders information on churches, parks, playgrounds, trails and cultural opportunities. All of these are quality of life factors that then make up a community's ability to compete for those individuals seeking a new place to live, work, play and learn.



## SOUTH SHORE TRAIN: CONNECTING CHICAGO

### Page 2, Support Letter

In an environment of constrained government finances, the best opportunities for communities to access resources to excel in any of these quality of life areas is through partnership and collaboration. Regional Cities is a unique new program that recognizes the key variable that quality of life plays in the equation for economic development success and population growth. More specifically, with the bulk of the projects contained in the submissions for the Regional Cities of Northern Indiana and the Northwest Indiana RDA pertaining to regional transportation, a key access point for prospective residents to be able to take advantage of the outstanding housing, schools and jobs available in Northern Indiana. The Northern Indiana Commuter Transportation District (NICTD) provides commuter rail transportation services for the four Northern Indiana counties of Lake, Porter, La Porte and St. Joseph. The South Shore Line currently runs between the South Bend Airport and Millennium Station in Chicago, with 17 stations in between. While the bulk of the ridership comes from these four counties, riders are also drawn from adjacent counties, southwest Michigan and southeast Chicago.

Capital improvements to the infrastructure of NICTD are high cost and high value. By increasing commuter options for residents of northern Indiana, we will directly connect Hoosiers with well-paying jobs in the Chicago market. The high-paying wages then mean that workers have a larger amount of income to spend on housing, commercial and entertainment purposes in northern Indiana. Linking together population and employment centers via public transportation has routinely demonstrated its success in growing the middle class of a region.

The multiple communities that make up this unprecedented collection of inter-regional cooperatives realize that by working together, we will better be able to meet the goal of improving the frequency, reliability and speed of travel between our areas of northern Indiana and Chicago. With these infrastructure improvements, northern Indiana becomes a very viable “suburb” of Chicago, opening up our area to new visitors and new businesses. At the same time, it will better enable our citizens to seek job opportunities in an area that has the nation’s 3<sup>rd</sup> largest economy.

### What sets these applications apart:

Never before has this type of cooperation and impact been realized. It is because of the historic and game-changing opportunity that we were compelled to take the initiative to urge La Porte County to participate and express our individual support for these applications. By selecting the applications of the Regional Cities of Northern Indiana and the Northwest Indiana Regional Development Authority, the collaboration of these two entities has the potential support projects that will greatly enhance the economies of six counties and transform northern Indiana’s reach to the Chicago market. The population of these six counties make up almost 20% of Indiana’s population, making this a unique opportunity for the Regional Cities initiative to revolutionize the region through the gains that ready transportation provides.



## SOUTH SHORE TRAIN: CONNECTING CHICAGO

### Page 3, Support Letter

Thank you very much for your attention and consideration of these two applications and we look forward to welcoming you to our region at any time so that we may show you first hand the impact that NICTD is currently making and the level of opportunity that exists from improving the NICTD infrastructure.

Sincerely,



Blair E. Milo, Mayor  
City of La Porte



Ron Meer, Mayor  
Michigan City, Indiana



## SOUTH SHORE TRAIN: CONNECTING CHICAGO



**NORTHERN INDIANA  
COMMUTER TRANSPORTATION DISTRICT**

33 E. U.S. HIGHWAY 12 • CHESTERTON, INDIANA 46304-3514

PHONE: 219.926.5744 • FAX: 219.929.4438

July 31, 2015

Mr. Victor Smith  
Secretary of Commerce  
Indiana Economic Development Corporation  
One North Capitol, Suite 700  
Indianapolis, Indiana 46204

Dear Secretary Smith:

This letter is written on behalf of the Northern Indiana Commuter Transportation District Board of Trustees expressing our support for the Regional Cities application put forth by the Regional Cities of Northern Indiana. We have been working cooperatively with community leaders throughout the greater South Bend/Mishawaka area on a set of high priority, game changing strategic investments in South Shore infrastructure that will change the face of Northern Indiana for decades to come.

Before these investments come on line, we must first bring our commuter rail infrastructure between South Bend and Michigan City to a state of good repair. We have been working to completely upgrade our overhead power distribution system but, due to limited funding availability, it has been a painfully slow process. We have 30 miles of overhead catenary to replace, and are only able to complete 5-6 miles per year. Under this approach it will take roughly 5 years to complete. However, with the assistance of Regional Cities support we will be able to accelerate the project and complete the final 21 miles in a single construction season. This will not only modernize our wire, but will also allow us the opportunity to extend the length of a critical passing siding in eastern LaPorte County and upgrade 8.3 miles of track. Also included in the application is money to fund the preliminary engineering necessary to relocate the South Shore Line tracks from the east side of South Bend International Airport to the west side of the airport. Upon completion of the engineering work, we can apply for federal funding for this project which will reduce travel time from South Bend by 10-12 minutes and eliminate 16 of 23 grade crossings.

Under the financing plan, the Regional Cities funds would leverage \$4.5 Million of NICTD funds along with \$21 Million of federal funds.

Once these projects are funded, we can move towards completing a set of strategic investments that will reduce travel time and improve train frequency, and thereby Northern Indiana's connectivity to Chicago.

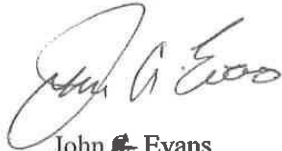


## SOUTH SHORE TRAIN: CONNECTING CHICAGO

Mr. Victor Smith  
Secretary of Commerce  
July 31, 2015  
Page 2

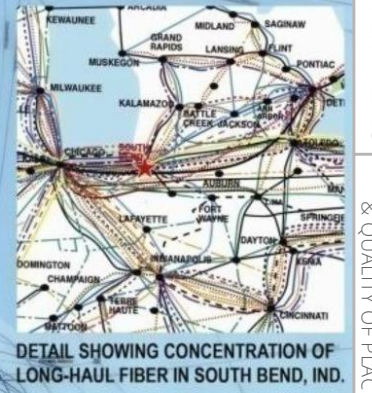
We are excited about what this collaboration will mean to the region and the State of Indiana and encourage your swift approval of the Regional Cities of Northern Indiana application.

Sincerely,



John A. Evans  
Chairman





In the Information Age, the entire world is a network. Each of us belongs to networks of people, communities and global economies.

St. Joe Valley Metronet helps businesses obtain fair prices for state-of-the-art connectivity and technology that is required in today's global economy.

Metronet subscribers have access to the largest concentration of transcontinental fiber networks in the country, allowing virtually unlimited communications worldwide.



## METRONET EXTENSION

### National Connectivity

- High-speed access to regional, statewide and national fiber networks
- 19 carriers for greater flexibility
- Cost-effective pricing
- Places our businesses on a level playing field with those in larger metropolitan areas
- Strengthens our region's ability to compete globally

### Summary

The St. Joe Valley Metronet Extension project involves the construction of new dark fiber in Elkhart County and further extension in Marshall County.

#### ELKHART COUNTY

Metronet's expansion into Elkhart County involves the installation of new conduit and fiber starting from the network in St. Joseph County, reaching into the areas of highest need in Elkhart County. A key component of this new build is to connect to the current fiber, thereby creating a single, multi-county, multi-city network.

#### MARSHALL COUNTY

Having completed its fiber build from St. Joseph County to Plymouth at the end of 2014, this project would further extend Metronet's footprint to the remaining incorporated areas of Marshall County including the towns of Culver, Bourbon, Argos and Bremen, as well as connecting Ancilla College and Culver Academies.

### Background/History

Entering its 10th year of operation, Metronet began as a 50-plus mile, dark fiber optic network that looped around South Bend offering state-of-the-art telecommunications connectivity. The network continued to grow in South Bend and soon expanded into Mishawaka, maintaining a single network design. End-users have the experience of unlimited bandwidth and unlimited speed while enjoying a network of vendors that provide a variety of services at competitive prices. Fiber infrastructure is typically exclusive to one vendor. Metronet is different. Think of it in the context of a highway distribution network. It is the difference between one trucking company that ships material versus the option of 20 trucking companies – competition matters.



## METRONET EXTENSION

A 2014 expansion extended the network beyond St. Joseph County for the first time, adding 33 miles of fiber to reach LaPaz, Lakeville and Plymouth in Marshall County. Metronet now covers more than 150 miles and serves more than 180 subscribers. The expansion into Marshall County was enabled through a public/private partnership funded by Marshall and St. Joseph counties, the City of Plymouth, St. Joseph Health Systems and Hoosier Racing Tire. To date, Metronet is providing more than a dozen organizations with the ability to operate with increased data transfer efficiencies, direct connectivity to data centers in St. Joseph County and access to several technology service providers.

In July 2015, Metronet announced an expansion that will extend the dark fiber

network to three Penn-Harrison-Madison (PHM) School Corporation schools on the east side of St. Joseph County. The expansion is being funded by a partnerships between St. Joe Valley Metronet, the PHM school corporation, TCU and an anonymous foundation, and is another first-rate demonstration of community support. This expansion, currently under construction, improves reliability by providing redundancy to PHM and will serve the Bittersweet branch of the library and other business subscribers.

Furthermore, construction of the PHM extension augments Metronet's ability to extend east into Elkhart County.





## METRONET EXTENSION

### Vision

St. Joe Valley Metronet's mission is to encourage the ongoing development of the educational, cultural, research and health care institutions; government-related agencies and other organizations that contribute to community and economic development, public health and safety, or workforce development in the Northern Indiana region. It achieves this by providing high-speed data communications network capabilities at the most cost-effective prices available. This project expands that mission to reach throughout the region.

Since high-speed connectivity is essential to all businesses, health care organizations, governmental agencies, financial institutions, K-12 and higher education institutions, the project has been identified as critical in several previous planning efforts across St. Joseph, Elkhart and Marshall counties. A key item in the Goshen Comprehensive Plan is the construction of a fiber loop in the downtown area to serve as a business attraction tool. The Elkhart Tech Park TIF, Consolidated South Elkhart TIF and Downtown TIF plans all call for improvements to the technology infrastructure, with the Tech Park TIF specifically identifying fiber optic infrastructure. This project has also been identified in the Town of Culver's comprehensive plan in 2014, Marshall County Economic Development Corporation's 2014 Strategic Plan and by Marshall County government.

The expansion of the fiber optic network will be a regional success story. Many existing regional subscribers will be able to expand their connections to Metronet's fiber, essentially "doubling down" on cost savings and increased productivity. New businesses across the region will be able to connect and realize savings as a result of increased access to the fiber, and more businesses will grow their service offerings with increased capability on the Metronet network. By increasing accessibility of high-speed dark fiber, the region will be able to cultivate and incubate the entrepreneurial spirit and leverage business connections through the many corporate-level executives living in the area.

By developing a more robust infrastructure foundation, the entire region will be in an advantageous position to leverage talent attraction and entrepreneurial growth in collaboration with the University of Notre Dame, Purdue Polytechnic Institute and IU South Bend. The expansion into Marshall County will specifically accelerate the establishment of entrepreneurship/incubator centers in Plymouth and Culver (Project #11), strengthening the ability to foster small business development. The low cost of connectivity in both urban and rural settings will be a tool for business attraction for economic development, increasing the marketability of our region.



## METRONET EXTENSION

### Project Plan

Project champions include Mary Jan Hedman, CEO, St. Joe Valley Metronet; Barkley Garrett, Director of Economic Development at the City of Elkhart; and Jerry Chavez, Executive Director of the Marshall County Economic Development Corporation.

Elkhart County project partners include City of Elkhart, City of Goshen, Elkhart County Economic Development Corporation, Elkhart County regional higher education institutions, private businesses and non-profit entities.

Marshall County project partners include City of Plymouth, Plymouth Redevelopment, Town of Culver, Culver Redevelopment Commission, Marshall County, Ancilla College, Culver Academies, Town of Bourbon, Bourbon Redevelopment, Town of Bremen, Bremen Redevelopment, Marshall County Economic Development Corporation, Metronet, Indiana Small Business Development Center and private sector businesses.

All capital expenditures for both Elkhart and Marshall County phases will occur within the first two years of the project, and will include: 1.) Design and engineering, 2.) Permitting fees, 3.) Installation of the conduit and all associated infrastructure (i.e. handholds), 4.) Installation of the fiber through the conduit and 5.) Splicing and interconnections with existing fiber networks.

The Elkhart County Metronet project will commence immediately and includes the following: 1.) Invite feedback from Project Partners, 2.) Conduct an Engineering and Market Study, 3.) Decide on final route and expansion plan, 4.) Explore capital contributors, 5.) Develop the Request for Proposal (RFP), 6.) Install conduit to house fiber, 7.) Install fiber through conduit, and 8.) Connect organizations.

The Marshall County Metronet project schedule includes the following: 1.) Market project to businesses or organizations that may benefit from Metronet (as was done in the first Metronet project), 2.) Plan the extension route to the communities including the towns of Culver, Bourbon, Argos and Bremen, and Ancilla College, 3.) Plan the route within the individual communities, 4.) Develop engineering plans and obtain necessary permits, 5.) Explore capital contributors, 6.) Develop RFP, 7.) Install conduit to house fiber, 8.) Install fiber through conduit, and 9.) Connect organizations.

#### METRONET EXTENSION

DESCRIPTION	INVESTMENT	TIMEFRAME
Conduit & Fiber (Marshall County —Loop Configuration)	\$7.39	2016
Conduit & Fiber (Elkhart County)	\$3.88	2016
<b>TOTAL INVESTMENT:</b>	<b>\$11.27</b>	



## METRONET EXTENSION

There are no ongoing revenues and expenditures. As this is a broadband infrastructure project, post-construction maintenance cost will be incurred by St. Joe Valley Metronet and covered by ongoing annual subscription revenue.

### INVESTMENT SUMMARY

#### METRONET EXTENSION

TOTAL PROJECT COST	\$11,271,605	PERCENT	SOURCE
State Public Funds	\$2,254,321	20%	Northern IN RDA (\$1.48 to Marshall Co. project and \$0.78 to Elkhart Co. project)
Local Public Funds	\$2,254,321	20%	Marshall Co. Governmental Agencies (\$1.48M); Elkhart Co. Governmental Agencies (\$0.78M)
Private Funds	\$6,762,963	60%	Elkhart Co. Capital Contributors (\$2.33M); Marshall Co. Capital Contributors (\$4.44M)

## Impact

### JOBS CREATED

The technology is key to creating the 200 jobs expected through the entrepreneurship center/ business incubator project and does not account for existing businesses such as Hoosier Racing Tire and their expected job growth due to Metronet advantages. The project will allow for businesses to expand their operations, and will be utilized to attract new businesses that require unlimited capacity broadband infrastructure.

### REVENUES GENERATED FROM PRIVATE SECTOR ACTIVITY

Approximately \$30 million in additional new capital investment, increased productivity and cost savings are expected over the first ten years as a result of this project. This estimate includes investment through business expansions resulting from new available technologies, and increased broadband capacities and speeds previously unavailable in Marshall and Elkhart counties. The anticipated ROI is through additional capital investment, and an estimate of \$2,000/month/subscriber in cost savings and increased productivity. Return on Investment (ROI) in terms of payroll or other benefits has not been quantified.



## METRONET EXTENSION

\$430,800 annual sales or other non-tax revenue generated. This will be concretely determined in the engineering and market analysis phase of the project. Estimations toward annual subscription fees are calculated based on subscriber numbers in year three, leveraging currently known viable candidates. The annual sales and revenue generated through the project will be dependent upon the number of subscribers that utilize the new broadband infrastructure. We expect the annual

subscriptions to increase annually. Prior discussions with local businesses indicate there is a demand for additional broadband services in order to increase speeds and capacity. When Metronet was extended to and throughout Plymouth, there were approximately 20 locations and a number of public agencies that signed on within the first three months. The increase in annual sales will result from increased operational efficiencies for local businesses and other subscribers.

## ANTICIPATED ADD-ON INVESTMENTS BY OTHER STAKEHOLDERS/GROUPS

As a result of better connectivity and performance, new companies will be more willing to locate in the area, as evidenced by several companies in St. Joseph County. In addition, new capabilities unlocked by local businesses will allow for greater expansion of services, e.g. new jobs being created.

St. Joe Valley Metronet connectivity provides readily available, low-cost, high-speed connectivity and transmission of limitless amounts of information at competitive flat-rate pricing with no per-mile charges.

This project will expand the availability of powerful and cost-effective broadband services for many regional businesses and support economic growth as a robust community asset, making the region more attractive for business recruitment. These benefits are not reserved to large business and institutional users. From 2010 to 2014, Metronet grew its subscriber base an average of 31% with the greatest growth in small and medium-size businesses.



## METRONET EXTENSION

### FINANCIAL INSTITUTIONS

Rick Rice, former President of TCU, stated that for his 26,000 member financial institution, he would be saving between \$250,000 and \$300,000 annually due to the switch to Metronet.

### COMMUNITY DEVELOPMENT

Metronet continues to find new and better ways to foster economic and community development. The enFocus nCloud: Socially Responsible Computing Initiative located in the Union Station Technology District uses Metronet as the backbone of a project allowing nonprofit organizations to share IT services and realize greater than \$300,000 per year in savings on telecommunications and internet access costs.

### EDUCATION

Higher education institutions use Metronet to connect to I-Light which enables state, national and international research and education connections and provides access to supercomputers and scientific data. The University of Notre Dame estimates that, on average, it transmits five terabytes of data per day using Metronet fiber, helping faculty, staff and students perform research projects.

K-12 schools use the unlimited broadband capacity as an essential tool for innovation in education, allowing educators to make

greater use of online tools and resources, including cloud-based applications and interactive learning tools. Connected schools are able to implement any curriculum tools without incurring high connectivity costs or forcing teachers to make choices because of inadequate bandwidth.

### HEALTH CARE

Hospitals, clinics and other health care facilities rely on high-speed bandwidth to transport digital images and patient data between facilities. The ability to move data quickly and efficiently is critical to the business of saving lives.

### SERVICE PROVIDERS

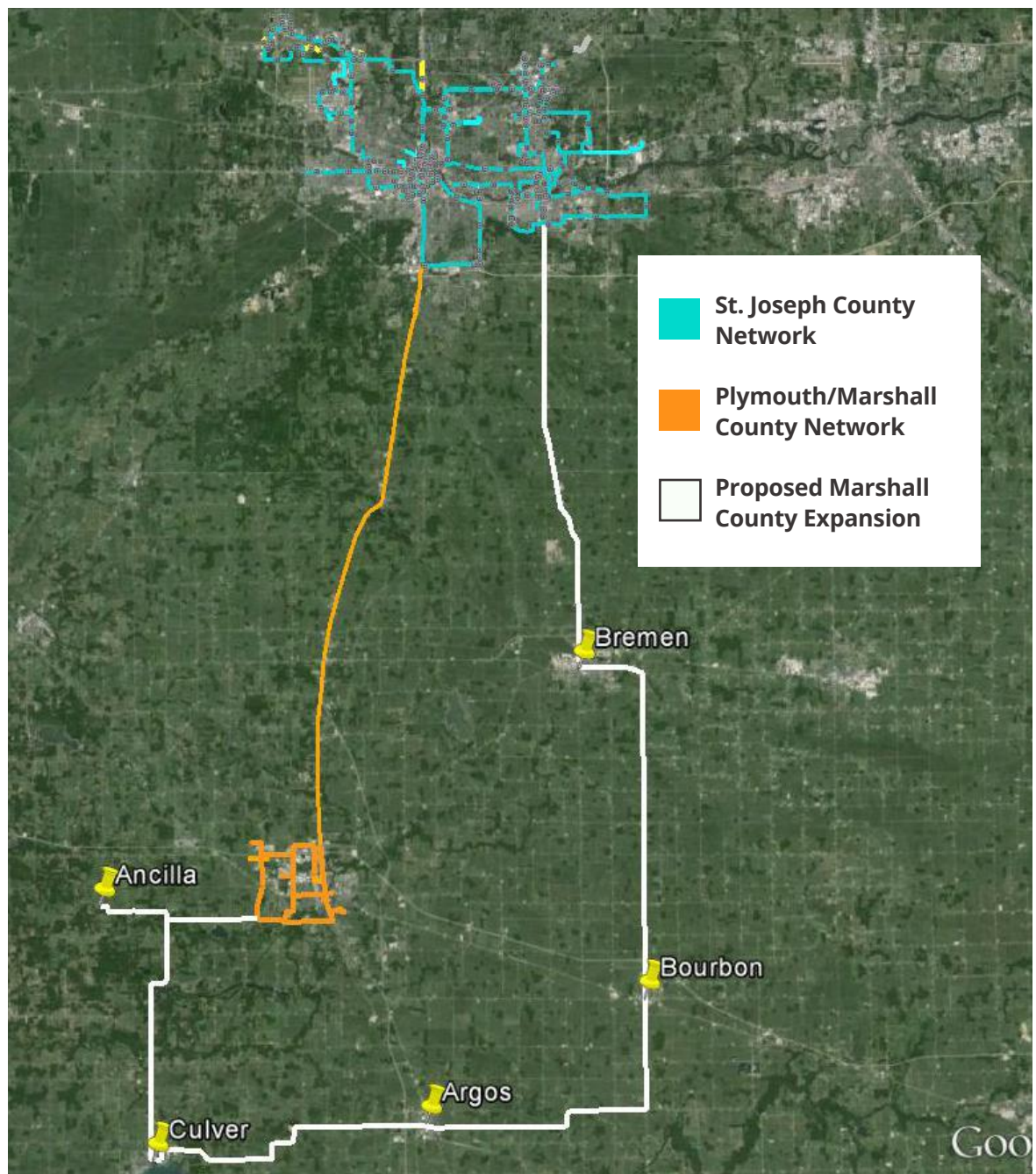
Metronet's value as an economic development tool increases as the market capitalizes on additional capability for low-cost broadband access, especially when the cost doesn't increase with volume.

Metronet works with more than 30 existing and emerging high-tech service vendors to promote and extend services such as cloud computing and data recovery, creating a growing market for vendors and more value for subscribers. One service provider noted that, in 2010, his business had grown 541% and, in 2011, by 341% because of the ability to deliver technological services to customers via Metronet's dark fiber.



## METRONET EXTENSION

## Proposed St. Joe Valley Metronet Expansion in Marshall County







## MARQUEE PROJECT V ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

The Elkhart Market District Blue Zone initiative will transform downtown Elkhart into a vibrant, full service city center by providing the full-scope of services, recreation, residential and commercial amenities the community has envisioned for a successful downtown and make a bold step forward by creating the Elkhart Blue Zone.

The Blue Zone project will spur an active, healthy and community-oriented neighborhood that takes advantage of existing assets such as the RiverWalk, sports fields, city parks, and existing health and wellness oriented businesses. The project includes the repurposing of a shopping center and development of new residential units, development of a new community health facility, and the establishment of a sports center and outdoor multi-use sports fields.



South Elevation  
Elkhart Health Club and Aquatics Center



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

### Summary

The City has been moving towards creating this vision for a healthy and satisfied Elkhart for many years. The Downtown Redevelopment Plan is the results of over two years of planning and public engagement through the Supporting our Main Assets (SoMa) initiative. This plan was



developed with the assistance of over 200 community members, civic leaders and business representatives that created the vision for Elkhart moving forward for the next 20 years. The Plan formalizes that initiative into actions and projects that will continue the success of downtown redevelopment efforts over the past 30 years and expands downtown Elkhart into the neighborhoods surrounding Main Street. The SoMa initiative clearly illustrated that downtown is the heart of our city and by creating a vibrant and active downtown we can transform our region.

### THE INITIATIVE INCLUDES DEVELOPMENT OF FOUR DISTINCT BUT RELATED PROJECTS IN THE MARKET DISTRICT OF DOWNTOWN ELKHART.

#### ELKHART'S MARKET DISTRICT BLUE ZONE INITIATIVE

PROJECT	PROJECT DESCRIPTION	CAPITAL INVESTMENT	TIMEFRAME
1	Residential and Commercial Development	\$65,000,000	2015–2019
2	Wellness Center and Natatorium	\$32,000,000	2015–Dec 2016
3	RiverWalk to Mapleheart Trail	\$900,000	Mid 2015–Dec 2016
4	Elkhart Field Sports Complex	\$29,350,000	Jan 2016–Dec 2018
TOTAL INVESTMENT:		\$127,250,000	





## PROJECT 1. RESIDENTIAL & COMMERCIAL DEVELOPMENT

The project includes the repurposing of a shopping center, development of new residential units, development of a new community health facility and the establishment of a sports center and outdoor multi-use sports fields.

The housing component would include 400 housing units in two phases. The first phase will consist of 200 rental units. The second phase will include 200 units, but will be a mix of rental and for sale units. These units will provide the first new construction housing units in downtown Elkhart since the 1980s.

The mixed-use residential and commercial development takes advantage of the sites proximity to the Elkhart River and existing RiverWalk as well as the many downtown attractions and amenities. The project will include the development of upscale housing, a redesigned commercial center and public amenities such as an extension of the existing RiverWalk Multi-Use path system and increased access points to the Elkhart and St. Joseph Rivers.



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

### PROJECT 2. COMMUNITY WELLNESS CENTER AND NATATORIUM

Plans have been developed to construct a \$30 million community center in downtown Elkhart. Key elements of this facility involve a fitness and wellness area, community gathering space, offices for local non profit organizations, and a regional natatorium for aquatic competition, recreation and physical therapy. Studies by experts in the field of aquatics indicate the viability of a regional

natatorium that will draw event participants from a radius of more than 200 miles for swim competitions. The intent is to create a “destination” facility for the Midwest (Indiana, Illinois, Ohio, Wisconsin and Michigan) while at the same time creating a wellness, fitness and community center for our local citizens.

### PROJECT 3. RIVERWALK TO MAPLEHEART TRAIL CONNECTION

Connect the RiverWalk to the Mapleheart Trail, connecting two communities with a multi-use trail. The RiverWalk connects to Elkhart’s bicycle Routes. The Mapleheart connects to Goshen’s trail system, including the Pumpkinvine, which connects to Middlebury and Shipshewana.

The RiverWalk ends near the intersection of Prairie St. and Waterfall Drive. The Mapleheart Trail begins at the intersection of Indiana Ave. and Sterling Ave.

### PROJECT 4. OUTDOOR FIELD SPORTS COMPLEX

A key component Blue Zone Development, the Field Sports Complex will include creating six public outdoor multi-use sports fields, a public championship field venue that would support the private development of an indoor sports complex that will accommodate both turf and court activities and a new hotel to serve the complex and downtown demand.

The Elkhart Field Sports Complex is being proposed as a part of a complete new vision for Downtown Elkhart’s RiverWalk District as a Blue Zone centered on the

creation of sports and recreation facilities that will not only meet local needs, but serve as an attraction for regional travel sports opportunities. The Field Sports Complex will be developed in conjunction with a the Community Wellness Center & Natatorium, along with a new Marina/ River Access development to transform the part of the RiverWalk District North of East Jackson Blvd. The project takes advantage of floodway issues that limit redevelopment opportunities for large pieces of the real estate in this district.



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

### Vision

The Innovate Indiana Plan is built on the idea of creating Innovation Districts that spur creative solutions to community issues, one of which is developing in downtown Elkhart. The City has developed a plan to move forward with local and regional partners in establishing Elkhart as a Blue Zone community with downtown as the center of that Blue Zone. The program is built around nine key concepts that stimulate healthy, active and engaged residents that live full lives and enjoy personal success as well as contributing to the success of their community.

The marketability of the housing project is dependent on creating a livable environment where resident will choose to live. Providing commercial and service opportunities in close proximity to their homes is critical for the urban living experience that will attract residents for the housing development. The commercial and services businesses will benefit from the project's 600 new residents that will frequent their establishments. This will all be connected by pedestrian friendly streets and our popular RiverWalk system.

As more residents choose to live in downtown Elkhart, the higher density development will require great community and outdoor spaces for them to enjoy. The location of this development is very attractive along the Elkhart River. This River is a wonderful nature amenity that allows for small craft access for kayaks and canoes

as well as fishing or even just taking a stroll along our beautiful RiverWalk. The RiverWalk Multi-Use path connects the downtown assets along the RiverWalk Culture Trail.

The sports complex will complement existing sports fields at Elkhart Central High School and Nibco Soccer Complex to create a density of facilities that will serve local youth sports groups, expand Elkhart schools sports offerings and attract regional sports travel tournament opportunities.

This cluster of facilities will complement existing sports-related assets in the Northern Indiana region by offering state of the art facilities to support swimming/ diving, soccer, lacrosse, rugby, volleyball, basketball, full-field indoor turf, paddling/ rowing and other river related activities. In addition, the development of these facilities greatly enhances the ability of the region to host travel sports events and activities. The activities generated at these new facilities, when combined with existing sports tourism assets such as the fields and ice rinks at the University of Notre Dame and Culver Academies, and with the Indoor Sporting Complex planned for Mishawaka, will serve to draw thousands of visitors and millions of dollars of visitor spending to the Northern Indiana region. Hotels and restaurants across the region will all benefit significantly from the increase in sports related visitors to the area.



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

### Project Plan

#### PROJECT 1. MARKET DISTRICT RESIDENTIAL & COMMERCIAL DEVELOPMENT

##### PROJECT 1. MARKET DISTRICT RESIDENTIAL & COMMERCIAL DEVELOPMENT

PHASE	PROJECT DESCRIPTION	INVESTMENT	TIMEFRAME
1	Residential (Foundry site)	\$30,000,000	Mid 2016–Late 2017
2	Commercial Redesign and Redevelopment (Easy Shopping)	\$10,000,000	Mid 2016–Mid 2017
3	Residential (current Martin's site)	\$25,000,000	Late 2017–Mid 2019
TOTAL INVESTMENT:		\$65,000,000	

##### INVESTMENT SUMMARY

##### PROJECT 1. MARKET DISTRICT RESIDENTIAL & COMMERCIAL DEVELOPMENT

TOTAL PROJECT COST	\$65,000,000	PERCENT	SOURCE
State Public Funds	\$13,000,000	20%	Northern IN RDA (\$13M)
Local Public Funds	\$13,000,000	20%	City of Elkhart – Downtown TIF (\$9M); Local revenue (\$4M)
Private Funds	\$39,000,000	60%	Phase 1 & 2 residential developers (\$17.5M each); retail developer (\$4M)

#### PHASE ONE. RESIDENTIAL ON THE FOUNDRY SITE

The first phase will consist of 200 rental units. These units will provide the first new construction housing units in downtown Elkhart since the 1980s. Housing data indicates both a demand for market rate housing as well as increasing rents and

housing values that would support the high quality development proposed. Elkhart has followed the nation-wide trend of residents choosing urban living environments and has over 100 residential units along Main Street. These units are in high demand as illustrated



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE



**WELL-WORN PATH THROUGH THE FOUNDRY SITE DEPICTS NEED FOR PEDESTRIAN ORIENTED DEVELOPMENT BETWEEN THE DOWNTOWN AREA AND THE COMMERCIAL OFFERINGS AT THE EASY SHOPPING PLAZA.**

by their very low vacancy rates. This information and a commitment by the City of Elkhart to invest in residential development in downtown are the driving forces behind this project.

The City of Elkhart Redevelopment Commission owns the shovel ready property at the former Elkhart Foundry. The buildings have been demolished, the site has been regarded for redevelopment and the environmental conditions have been reviewed by IDEM.

A well-known and respected residential developer with ties to Elkhart has provided a proposal for the construction of the first

200 apartment units and could be a project partner. The residential development partner has been successfully developing real estate since 1993 and has consistently ranked as a Top 50 developers nationally for the past eight years for multi-family developments. The firm has over 400 employees and has developed over 46 properties and over 8,000 units. They are a full service firm and provided the development, construction and management expertise for their projects.

Construction of the development would start six months from the announcement of the award of funding, with project completion expected in 18-20 months.



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

### PHASE TWO. COMMERCIAL REDESIGN AND REDEVELOPMENT

The major tenant of the Easy Shopping Center is Martin's Super Markets, who is interested in moving from their current location farther north within the center to increase their visibility of their store, make a much needed reinvestment in their business at the location and open-up access to the Elkhart River for phase two of the residential development. Martin's, a local supermarket chain that has been successfully providing quality service and products for our region since the 1940s, currently operates 21 stores

in the region and is a major supporters of community activities and events. The City has met with the property owner and Martin's Super Markets to develop a proposal for this project. Because the existing building would continue to operate while construction for the new facility is underway, construction of the development would start six months from the announcement of the award of funding and construction of the new building and redesigned shopping center would take twelve to eighteen months.



PHASE THREE RESIDENTIAL DEVELOPMENT WILL BE LOCATED ALONG THE RIVER, WHICH IS CURRENTLY THE DELIVERY AREA BEHIND MARTIN'S SUPERMARKET WITH SCRUB AND TREES BLOCKING THE RIVER VIEW ADJACENT TO THE RIGHT OF THE DRIVE.

### PHASE THREE. RESIDENTIAL ON THE MARTIN'S SUPER MARKET SITE

Phase Three includes 200 additional residential includes including a mix of rental and for sale units. The proposed site of the second portion of residential units is the current location of Martin's Super Market.

The project would start with the other two portions of the project with acquisition and design during the first six months after the announcement of the award of funding. But because the new commercial facility



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

would have to be constructed and business operations moved, the construction of this phase of residential units would commence 20-24 months after Phase 2 of the project is expected to take 18-20 months to complete. This timing is attractive to both the commercial component of the project as it allows for uninterrupted service to their clients, but it also works well with the phase one residential project as the construction

will begin as the phase one is completed allowing for the developer to move from one location to the next with ease.

The City of Elkhart will be the sponsor for this project through the City of Elkhart Redevelopment Commission with staff support from the Community and Redevelopment and Economic Development Departments.

## Impact of Market District Residential & Commercial Development

This project will be critical to further the revitalization of downtown Elkhart specifically, but will impact the city as a whole as downtown is the heart of the city and all residents and visitors can call downtown their own. As the local downtowns of our region are revitalized and take their place as economic centers, the entire area benefits. As one of the major cities in Northern Indiana, the redevelopment of Elkhart will help to transform the region in several ways, including:

1. Combat perception of “rust-belt” region with no future;
2. Provide amenities and attractions to develop a marketing strategy that speaks to the region as a whole and its nearly 620,000 residents, with recent increases in population, as opposed to individual counties of 200,000 (Elkhart) or 275,000 (St. Joseph);
3. Provide complementary but not competing assets and attractions to provide a high quality of life for regional residents and visitors;
4. Provide quality residential and commercial opportunities region-wide so residents can have a full and rewarding life in any of the communities.



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

### This project meets the needs and objectives outlined in several development plans, including:

- The need for a broader range of housing types and values was identified in the 2015-2020 City of Elkhart Consolidated Plan.
- The Redevelopment of this area and specifically this project was identified in the 2014 Downtown Elkhart Redevelopment Plan.
- The need for higher-value housing in the City of Elkhart was identified in the 2014 Elkhart County Housing Needs Assessment.
- The need for market-rate housing and a revitalized commercial center in downtown was identified in the 2013 SoMa Implementation Strategy.

The proposed 600 new residents that will live and shop in downtown Elkhart will provide approximately \$30 million in aggregate income and \$12 million in retail sales. This would result in an estimated income tax from the residents of approximately \$475,000 and a 7% sale tax would produce \$840,000 annually. The projects are anticipated to generate approximately \$725,000 in real estate taxes annually. In addition, these residents will create the vitality and energy needed to continue to revitalize downtown Elkhart and improve the quality of life of the entire region.

The commercial redevelopment project will generate an estimated \$5 million in retail sales, payroll of over \$2 million and \$115,000 in real estate taxes annually.

Total projected real estate taxes of \$840,000 annually along with the sales taxes generated of roughly \$1.19 million from \$17 million in sales, as well as annual income taxes from the residents of approximately \$475,000 put the total cash return at approximately \$2.480 million annually. With the public investment of \$26 million this project would have a payback period of about 10½ years.

Annual sales would be generated from the commercial sales for this project of \$5 million annually as well as the \$12 million in annual sales from the 600 residents living downtown in the residential development.

The Residential Development will result in approximately 250 construction jobs per phase; 30-40 permanent jobs related to the apartments and additional with the commercial space for restaurants and small commercial spaces within the development. Commercial Development will result in approximately 100 construction jobs; 105 permanent jobs related to the retail development.



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

### PROJECT TWO. COMMUNITY WELLNESS CENTER AND NATATORIUM

This project represents the development a \$30 million community center in downtown Elkhart. Key elements of this facility involve a fitness and wellness area, community gathering space, offices for local not-for-profit organizations, and a regional natatorium for aquatic competition, recreation and physical therapy. Studies by experts in the field of aquatics indicate the viability of a regional natatorium that will draw event participants from a radius of more than 200 miles for swim competitions. The intent is to create a “destination” facility for the Midwest (Indiana, Illinois, Ohio, Wisconsin and Michigan) while at the same time creating a wellness, fitness and community center for our local citizens.

#### INVESTMENT SUMMARY

##### PROJECT TWO. COMMUNITY WELLNESS CENTER AND NATATORIUM

TOTAL PROJECT COST	\$32,000,000	PERCENT	SOURCE
State Public Funds	\$6,000,000	19%	Northern IN RDA
Local Public Funds	\$6,000,000	19%	City of Elkhart
Private Funds	\$20,000,000	63%	\$3M private funding + \$17M Non Profit Funds (Beacon Hospital, Community Foundation)

### PROJECT COLLABORATION:

- Beacon Health System owns and operates a number of wellness facilities.
- Elkhart Community Schools has many years of experience managing school based pools.
- The City of Elkhart is well experienced in managing major redevelopment and capital projects.
- The Elkhart County Community Foundation has 26 years of experience partnering with various non profit organizations on capital projects benefiting the community.
- The Elkhart Youth and Community Center has a 45 year history of owning and running a fitness and community facility.



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE



South Elevation  
Elkhart Health Club and Aquatics Center



### IMPACT OF COMMUNITY WELLNESS CENTER AND NATATORIUM

The ROI on this project can be measured by a number of different factors.

- Community Health and Wellness
- Economic Impact and multiplier effect of tourism
- Downtown revitalization
- Increased property values in surrounding neighborhoods
- Job creation (construction and permanent facility staffing)

Annual revenues related to Aquatics, Health Club and Community Center Combined are estimated at \$2.9 million. Annual sales for Aquatics are estimated at \$900,000 in year one. The Health Club is estimated to bring

in \$1.5 million in revenues. Physical Therapy and Other Community Activities add another \$100,000 per year. Endowment revenues of \$400,000 are planned for the total of \$2.9 million. The regional event forum of the natatorium is expected to generate more than \$250,000 each year in revenues from non-local visitors. These are projected facility rental and gate revenues from the facility. With a multiplier estimate of 10X spending in local hotels, restaurants, grocery stores, retail shops, bars and gas stations we project \$2.5 million of increased spending in the local community which results in approximately \$175,000 in increased tax revenue.

41 program and facility staff jobs will be created.



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE



ONGOING IMPROVEMENTS TO THE RIVERWALK, WHICH CURRENTLY  
ENDS HERE, AT PRAIRIE & WATERFALL.

### PROJECT THREE. RIVERWALK TO MAPLEHEART TRAIL CONNECTION

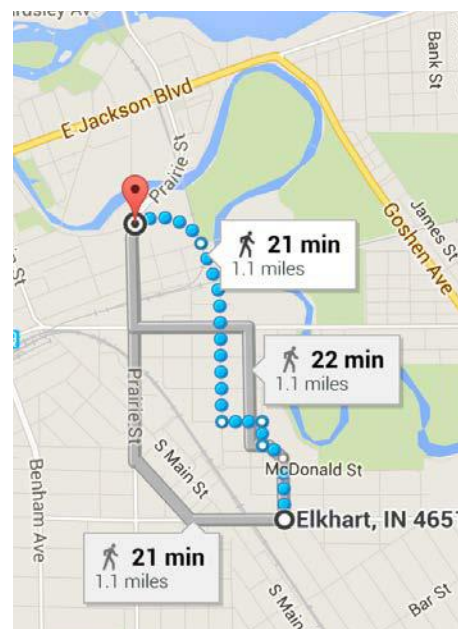
The City is fortunate to have a world class botanical garden, state-of-the-art theatre, several local museums, great restaurants and an expansive parks system that can all be enjoyed on foot along the RiverWalk Culture Trail. This project focuses on connecting the gaps between trail systems in the Market District area.



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

Currently, the RiverWalk ends near the intersection of Prairie St. and Waterfall Drive. The Mapleheart Trail begins one mile to the south, at the intersection of Indiana Ave. and Sterling Ave.

This project will connect the downtown Elkhart RiverWalk, which already connects to Elkhart's bicycle Routes with the Mapleheart Trail, which already connects to Goshen's trail system, including the Pumpkinvine, which connects to Middlebury and Shipshewana.



### INVESTMENT SUMMARY

#### PROJECT THREE. RIVERWALK TO MAPLEHEART TRAIL CONNECTION

TOTAL PROJECT COST	\$900,000	PERCENT	SOURCE
State Public Funds	\$180,000	19%	Northern IN RDA
Local Public Funds	\$180,000	19%	City of Elkhart & City of Goshen
Private Funds	\$540,000	63%	\$290,000 private funding + \$250,000 Non Profit Funds (Elkhart Chamber, Community Foundation)

This project is a collaborative effort involving the City of Elkhart, Elkhart County, City of Goshen, Beacon Health System, IU Health— Goshen, Greater Elkhart Chamber of Commerce and the Elkhart County Community Foundation.

Elkhart County parks developed the Mapleheart Trail, which would connect to this project. They developed a multi-use path along CR 10 in Elkhart County, with plans to expand. The City of Elkhart has developed several bicycle lanes through the city and is in the process of planning other multi-use paths.



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

### PROJECT FOUR. ELKHART FIELD SPORTS COMPLEX

A key component Blue Zone Development, the Field Sports Complex will include creating six public outdoor multi-use sports fields, a public championship field venue that would support the private development of an indoor sports complex that will accommodate both turf and court activities and a new hotel to serve the complex and downtown demand. This development will complement existing sports fields at Elkhart Central High School and Nibco Soccer Complex to create a density of facilities that will serve local youth sports groups, expand Elkhart schools sports offerings, and attract regional sports travel tournament opportunities.

#### INVESTMENT SUMMARY

##### PROJECT FOUR. ELKHART FIELD SPORTS COMPLEX

TOTAL PROJECT COST	\$29,350,000	PERCENT	SOURCE
State Public Funds	\$4,000,000	14%	Northern IN RDA
Local Public Funds	\$5,350,000	18%	City of Elkhart TIF (Cassopolis & Downtown), Elkhart Community Schools
Private Funds	\$20,000,000	68%	\$18M private funding + \$2M Non Profit Funds (Elkhart Chamber, Community Foundation)

Public Sector Investment (local & state) in this project is anticipated to be just over \$9 million, including funds from the City of Elkhart and Elkhart Community Schools (ECS). This investment will leverage \$2 million from the Elkhart County Community Foundation and \$10 million in private financing to construct the indoor facility. In addition, a new hotel will become part of the mixed use development south of Jackson Blvd that will create another \$8 million in private investment.

### IMPACT OF ELKHART OUTDOOR FIELD SPORTS COMPLEX

The Elkhart County Convention and Visitors Bureau (ECCVB) facilitated a feasibility and market analysis that supports the proposed field sports complex development based on identified strengths of local sports users, and enhancing/complementing existing facilities and events. Specifically, the Field Sports Complex will bring together the City of Elkhart Parks and Recreation Department, Elkhart Community Schools and local sports organizations including Indiana Rugby, FC Indiana Soccer, and Elkhart Flames Soccer in the expansion of activities that can be hosted in Elkhart. The Elkhart Community Schools have expressed an interest in expanding sports offerings for ECS students (new sports such as lacrosse



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE

& rugby) and recognize the benefits of offering first class facilities as a tool to attract new students to the school district. Indiana Rugby currently operates a rugby specific facility on the north side of Elkhart that attracts multiple regional and national tournaments and camps throughout the year – the additional assets developed as a part of the Field Sports Complex will give them the ability to expand new offerings and extend the number of months they can play and train, further consolidating Elkhart's reputation as a premier rugby destination. The Elkhart Flames travel soccer club currently operates out of the Nibco Soccer Complex and has successfully hosted state level travel soccer events – the proximity of the new Field Sports Complex will allow them to considerably upgrade the number and quality of the events they host. Finally, FC Indiana has expressed an interest in locating their Men's and Women's professional soccer teams at the proposed Field Sports Complex. FC Indiana Head Coach Shek Borkowski is also the current

Head Coach of the Haiti Women's National Team that would have its base of operations in Elkhart as they train and prepare for future international competitions such as the World Cup. The proposed Indoor Complex will meet identified demand for indoor soccer/lacrosse/rugby, in addition to a growing demand for volleyball facilities. Local operators of existing sports and fitness centers are being actively engaged to identify private development and operations management of the indoor complex.

In addition, the sports complex will generate approximately 35,000 room nights annually. ECCVB research indicates lodging visitors spend \$96 per person per day - sports travel generates an average of two persons per room per night for a total \$6.7 million in visitor spending annually.

This project falls in line with the following Community Plans: City of Elkhart Downtown TIF Plan, SoMa Downtown Revitalization Plan, and Elkhart County CVB Tourism Development Plan.

## Collective Impact

The marketability of the housing project is dependent on creating a livable environment where resident will choose to live. Providing commercial and service opportunities in close proximity to their homes is critical for the urban living experience that will attract residents for the housing development. The commercial and services businesses will benefit from the project's 600 new residents

that will frequent their establishments. This will all be connected by pedestrian friendly streets and our popular RiverWalk system.

As more residents choose to live in downtown Elkhart, the higher density development will require great community and outdoor spaces for them to enjoy. The location of this development is very



## ELKHART MARKET DISTRICT BLUE ZONE INITIATIVE



attractive located along the Elkhart River. This River is a wonderful natural amenity that allows small craft access for kayaks and canoes as well as fishing or even just taking a stroll along our beautiful RiverWalk. The RiverWalk Multi-Use path connects the downtown assets along the RiverWalk Culture Trail.

The sports complex will complement existing sports fields at Elkhart Central High School and Nibco Soccer Complex to create a density of facilities that will serve local youth sports groups, expand Elkhart schools sports offerings and attract regional sports travel tournament opportunities.

This cluster of facilities will be unique within the Northern Indiana region, connecting with existing assets to offer state of the art facilities to support swimming/diving, soccer, lacrosse, rugby, volleyball, basketball, full-field indoor turf, and paddling/rowing and other river related activities.

This development will be a significant tool for both the City and the Elkhart Community Schools to attract families to live in the City of Elkhart. The foundation of the success of these facilities relates directly to serving the needs of local residents and local sports organizations. In addition, the development of these facilities greatly enhances the ability of the community to host travel sports events and activities. These new facilities, when combined with the existing sports tourism assets at the University of Notre Dame and Culver Academies and the Indoor Sports Complex planned for Mishawaka, will serve to draw thousands of visitors and millions of dollars of visitor spending to the Northern Indiana region.

Finally, the development of the sports and recreation facilities on the north side of East Jackson Blvd will directly support the City's identified plans for redevelopment of the portion of the RiverWalk District on the south side of East Jackson Blvd and in Downtown Elkhart. The City of Elkhart is actively working with housing and retail developers for the creation of a large mixed-use development for the property immediately South of the Field Sports Complex. The hotel portion of this project is anticipated to be located within the portion of the real estate south of Jackson Boulevard to continue support of the redevelopment plan. The development of the sports and recreation facilities will help to minimize the risks associated with the mixed-use development, and should result in limiting the City's financial participation in the associated redevelopment activities.



# PROJECT SNAPSHOTS



## PROJECT SNAPSHOTS

Only capital expenditures and related funds are described in each project's financial summary below; please see full project details for additional project budget and funding information.

### EXHIBIT B-3

Includes NPV values for each project and the portfolio

### EXHIBIT B-4

Includes full project details





## CONNECTIVITY

### REGIONAL

# Metronet Extension: Dark Fiber Expansion throughout Region (#10)

## PROJECT SUMMARY

This project involves the construction of dark fiber with greatly enhanced bandwidth capabilities in both Elkhart and Marshall Counties and would expand the availability of powerful and cost-effective broadband services for many regional businesses and support economic growth as a powerful community asset. This project would bring Metronet broadband services to the remaining incorporated areas of Marshall County, notably to Culver Academies and Ancilla College, and throughout Elkhart County. Further, the Metronet expansion would support the establishment of entrepreneurship/incubator centers in Plymouth and Culver.

The hub of the Metronet connection is located in the South Bend Innovation District, leveraging the 2nd largest carrier hotel in the state of Indiana to provide abundant bandwidth capabilities at a competitive cost to businesses in Northern Indiana.

## IMPACT

The Metronet Expansion project will provide an amenity to many businesses and residents and enhance regional productivity and connectivity by cultivating and incubating the entrepreneurial spirit and leveraging business connections across Northern Indiana. It will also enhance higher education-community partnership by encouraging entrepreneurial development support.

*\*See Marquee Project Summary for additional detail*

### PROJECT CONTACT

MARY JAN HEDMAN  
Director, St. Joseph Valley Metronet  
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metronetzing.com



## FINANCIAL SUMMARY

Total Capital Expenditures	\$11,271,605
Private Funding	\$6,762,963
Local Public Funding	\$2,254,321
State Public Funding	\$2,254,321
Private/Public/Other Ratio	60/40/0





## CONNECTIVITY

### REGIONAL

# South Shore Train: Connecting Chicago (#35)

## PROJECT SUMMARY

This is a \$270 million, eight-year project being supported through an active inter-regional collaboration of the Northern Indiana RDA, LaPorte County and the Northwest Indiana RDA. The ultimate objective is to most efficiently and effectively leverage the South Shore Train asset – by improving the frequency, reliability and speed of this critical linkage between South Bend and Chicago, and all of the communities in between. Visitors and businesses will also benefit and be attracted to the area due to improved accessibility to world-class amenities.

There are four phases to the project, with the line traversing through St. Joseph, LaPorte, Lake and Porter counties, and serving all of the cities and towns within and surrounding those counties. The Innovate Indiana plan includes details of the two phases located geographically within its RDA region.

## IMPACT

This project will improve South Bend's connectivity to Chicago, exposing Northern Indiana residents to higher paying jobs, connecting local businesses to the greater Chicago area, and improving regional quality of life.

*\*See Marquee Project Summary for additional detail*

### PROJECT CONTACT

JOHN N. PARSONS  
Northern Indiana Commuter  
Transportation District  
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nictd.com



FINANCIAL SUMMARY	PHASE 1	PHASE 2
Total Capital Expenditures	\$31,725,000	\$19,000,000
Private Funding	\$n/a	\$n/a
Local Public Funding	\$4,758,750	\$2,850,000
State Public Funding	\$4,758,750	\$13,300,000
Private/Public/Other Ratio	0/30/70	0/30/70

Phase Three and Four will be further detailed in the Northwest Indiana Regional Development Plan.





## INNOVATION

# INNOVATION DISTRICT SOUTH BEND Studebaker Administration Building (#1)

## PROJECT SUMMARY

Located in the Renaissance District, this project provides for reuse of the former Studebaker Administration Building as an office space for a technology company. The project will adaptively reuse 145,500 square feet and enhance a complex that will serve as an economic magnet similar in relative scope to the American Tobacco Factory in Durham, North Carolina and 350 Cermak in Chicago, Illinois. The Studebaker Administration Building will be an anchor of density and technical synergies in the South Bend Innovation District.

## IMPACT

This project will create density, enable connectivity, serve as a high-tech amenity, and enhance regional productivity by creating a place and an environment for businesses, higher education institutions, and residents to live, work, interact, learn, and exchange ideas. Specifically, the repurposing of the office building will transform a vacant blighted structure in the urban core of the city into a vibrant work environment adding density to the South Bend Innovation District.

*\*See Marquee Project Summary for additional detail*

### PROJECT CONTACT

**SHAWN PETERSON**  
VP of Strategic Initiatives & General Counsel,  
Union Station Technology Center  
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ustechcenter.com



## FINANCIAL SUMMARY

Total Capital Expenditures	\$19,745,000
Private Funding	\$13,145,000
Local Public Funding	\$3,300,000
State Public Funding	\$3,300,000
Private/Public/Other Ratio	67/33/0





## INNOVATION

# INNOVATION DISTRICT SOUTH BEND STUDEBAKER BUILDING 84. PHASE III (#2)

## PROJECT SUMMARY

Located in the Renaissance District, Phase III of the Studebaker Factory Redevelopment Project provides for reuse of Building 84 (Ivy Tower) as a data center, research and technology grade office space and residential apartments. The project will adaptively reuse 545,500 square feet and create an economic magnet for the region similar in relative scope to the American Tobacco Factory in Durham, North Carolina and 350 Cermak in Chicago, Illinois. Building 84 will provide a technology hub with a live-work environment for millennials, technologists, and researchers. Building 84 will be an anchor of density and technical synergies in the South Bend Innovation District.

## IMPACT

This project will create density, enable connectivity, serve as a high-tech amenity, and enhance regional productivity by creating a place and an environment for businesses, higher education institutions, and residents to live, work, interact, learn and exchange ideas. This project will provide an environment for higher education and community partnerships and will overall support the community's goal of being a high-performing community.

*\*See Marquee Project Summary for additional detail*

### PROJECT CONTACT

SHAWN PETERSON  
VP of Strategic Initiatives & General Counsel,  
Union Station Technology Center  
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ustechcenter.com



*Rendering of the courtyard that will connect the technology, office, commercial and residential components within the Renaissance District.*

## FINANCIAL SUMMARY

Total Capital Expenditures	\$102,000,000
Private Funding	\$62,000,000
Local Public Funding	\$20,000,000
State Public Funding	\$20,000,000
Private/Public/Other Ratio	61/39/0





## INNOVATION

# INNOVATION DISTRICT SOUTH BEND ADVANCED MANUFACTURING DESIGN CENTER (#4)

## PROJECT SUMMARY

Located in the Renaissance District, the Advanced Manufacturing and Design Center (AMDC) will work with industry, education and training providers to expand our region's competencies and opportunities for our region's academic institutions and corporate users. AMDC will offer design and digital manufacturing equipment for established businesses and entrepreneurs to use for prototyping and low-level production runs to incubate new products and businesses in the region. It's location within No. 113 at Renaissance District in the South Bend Innovation District contributes to the area's density and technical synergies.

## IMPACT

This project aligns with the region's goals of community and higher-education partnerships, productivity, connectivity, and high-performing communities since it connects residents and businesses with valuable resources and career development opportunities that are provided in partnership with the region's higher education institutions.

### PROJECT CONTACT

**BOB SUTTON**  
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springboardengineers.com



## FINANCIAL SUMMARY

Total Capital Expenditures	\$3,120,000
Private Funding	\$1,532,260
Local Public Funding	\$793,870
State Public Funding	\$793,870
Private/Public/Other Ratio	49/51/0





## INNOVATION

# INNOVATION DISTRICT SOUTH BEND THE STREAM FACTORY (#5)

## PROJECT SUMMARY

Located in the Renaissance District, the STREAM Factory will be the primary STEM education hub in Northern Indiana. It is designed around the eight economic sectors of the region to develop a thriving STEM workforce for current and future industries and employers. The facility will provide an innovative exhibit space for students, career development classrooms, laboratory space and a STEM resource area with a lending library for educators and the community. Additionally, the STREAM Factory will provide professional development courses for K-12 educators and parents. It's location within No. 113 at Renaissance District in the South Bend Innovation District contributes to the area's density and technical synergies.

## IMPACT

This project aligns with the region's goals of community-higher education partnerships, productivity, connectivity, and high-performing communities since it connects residents and businesses with valuable resources and career development opportunities that are provided in partnership with the region's higher education institutions. It will enrich the quality of life by providing a source of education, career development and entertainment; enhance awareness of educational requirements related to STEM-related careers in the region; facilitate engagement of STEM partnerships among various organizations; and establish a venue for regional businesses to share their STEM expertise.

### PROJECT CONTACT

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Michiana Science and Technology  
Center, Inc. (MSTCi)  
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### FINANCIAL SUMMARY

Total Capital Expenditures	\$6,170,000
Private Funding	\$4,200,000
Local Public Funding	\$1,500,000
State Public Funding	\$470,000
Private/Public/Other Ratio	68/32/0





## INNOVATION

# INNOVATION DISTRICT SOUTH BEND SOUTH BEND CODE SCHOOL (#6)

## PROJECT SUMMARY

Located in the Renaissance District, South Bend Code School offers workforce training that will equip potential employees with the web development skills needed to obtain jobs at the region's technology focused companies. The school is projected to generate over two hundred trained workers to fill positions in the next five years, totaling over \$13 million in regional salaries. The school will enable technology companies and start-ups to grow and will encourage like-minded companies to move to or start up in the region. It's location within No 113 at Renaissance District in the South Bend Innovation District contributes to the area's density and technical synergies.

## IMPACT

By connecting residents with valuable technical training and workforce development programming, the density and productivity of the local tech workforce will increase. As this happens, the density of tech companies in the region will increase since they will have access to critical talent. Notre Dame is a partner in this effort, thus this project also aligns with the goals of higher education-community partnerships. All of these factors combined will further enhance the success of the region.

### PROJECT CONTACT

ALEX SEJDINAJ  
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574.299.3955  
alex@southbendcodeschool.com



### FINANCIAL SUMMARY

Total Capital Expenditures	\$725,000
Private Funding	\$n/a
Local Public Funding	\$n/a
State Public Funding	\$578,200
Private/Public/Other Ratio	0/80/20





## INNOVATION

### ELKHART

## ETHOS Robotics Facility (#9)

### PROJECT SUMMARY

ETHOS Science Center offers a variety of hands-on STEM programming for both students and teachers. In order to accommodate rapidly growing programs and activities, including the high-demand robotics program, ETHOS plans to move into a building that will be donated by Bayer. This project includes renovations necessary to transform the building into a facility that is adequate for ETHOS to serve as a regional provider of STEM programming, with particular emphasis placed on expanding its K-12 robotics programming.

### IMPACT

This project will serve as a regional provider of STEM programming, increasing educational opportunities and positively impacting the region's economy.



### FINANCIAL SUMMARY

Total Capital Expenditures	\$3,636,625
Private Funding	\$2,571,975
Local Public Funding	\$532,325
State Public Funding	\$532,325
Private/Public/Other Ratio	71/29/0

### PROJECT CONTACT

PATSY BOEHLER  
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ethosinc.org





## INNOVATION

### PLYMOUTH

# Entrepreneurship Centers in Plymouth & Culver (#11)

## PROJECT SUMMARY

The Marshall County Entrepreneurship Center / Business Incubator is a strategic plan to establish two centers, one in the City of Plymouth and one in the Town of Culver. Both centers will utilize dark fiber served via the Metronet Extension (#10) as a business advantage to cultivate the entrepreneurial spirit and leverage the educational platform with Indiana universities and secondary education providers.

## IMPACT

This project will enhance productivity and connectivity by cultivating and incubating the regional entrepreneurial spirit and leveraging business connections. It will also enhance higher education-community partnership by encouraging entrepreneurial development support with regional institutions of higher learning. This initiative leverages unlimited bandwidth broadband infrastructure provided by another public/private partnership through the Metronet.



### PROJECT CONTACT

**JERRY CHAVEZ**  
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orgmarshallcountyedc.org

### FINANCIAL SUMMARY

Total Capital Expenditures	\$8,000,000
Private Funding	\$4,800,000
Local Public Funding	\$1,600,000
State Public Funding	\$1,600,000
Private/Public/Other Ratio	60/40/0





## PRODUCTIVITY

### REGIONAL

# Health Education Active Learning Lab (#3)

## PROJECT SUMMARY

The Health Education Active Learning Lab (HEALL) fills the need for clinical education through simulated training environments for the medicine, nursing and emergency responder sectors through the use of modern replicas of three patient care environments. These simulations instruct and facilitate active learning while measuring student performance and competencies which leads to a growing regional health care workforce and improved health care for the region by advanced, well-trained practitioners. It's location within No 113 at Renaissance District in the South Bend Innovation District contributes to the area's density and technical synergies.

## IMPACT

This project will help the region to develop its leading growth industry, health care, while improving health outcomes, thereby lowering the per-patient cost of medical care borne by individuals and the state.



### FINANCIAL SUMMARY

Total Capital Expenditures	\$4,014,000
Private Funding	\$2,408,400
Local Public Funding	\$802,800
State Public Funding	\$802,800
Private/Public/Other Ratio	60/40/0

### PROJECT CONTACT

TERRY ALLISON  
Chancellor, IU South Bend  
574.520.4220  
tlalliso@iusb.edu  
iusb.edu





## PRODUCTIVITY

### REGIONAL

# Bethel College Free Enterprise Center (#12)

## PROJECT SUMMARY

The Bethel College Free Enterprise Center development will add 4,000 square feet of dedicated conferencing space to the Bethel College campus. It will also provide dedicated space to serve the community as a business incubator and will house the college's academic business department. To maximize the effective interactions between the local business community and Bethel's own academic pursuits in business, the college will move the school's business department to the Center.

## IMPACT

The Free Enterprise Center will be a significant resource for Northern Indiana as a business incubation resource and an additional conferencing destination. This community-higher education partnership will help the region achieve its goal of being a high-performing community.



### FINANCIAL SUMMARY

Total Capital Expenditures	\$7,120,000
Private Funding	\$5,440,800
Local Public Funding	\$1,400,000
State Public Funding	\$279,200
Private/Public/Other Ratio	76/24/0

### PROJECT CONTACT

GREGG A. CHENOWETH  
Ph.D., President, Bethel College  
574.807.7210  
Gregg.Chenoweth@BethelCollege.edu  
bethelcollege.edu





## PRODUCTIVITY

### REGIONAL

# IU South Bend HealthLinc Health & Wellness Center (#28)

## PROJECT SUMMARY

The Trustees of Indiana University, in partnership with HealthLinc, Inc., a federally funded provider of community health clinics in Northern Indiana, will renovate and expand an 11,250 square-foot community Health and Wellness Center (IUSB/HL HWC) on the IU South Bend campus. The IUSB/HL HWC will expand access to primary medical and behavioral health services, as well as dental services for a population of students, faculty and staff at IU South Bend, as well as underserved and disadvantaged populations in the local community.



## IMPACT

This project will expand health education programming, as well as access to healthcare for the underserved in the local community.

### PROJECT CONTACT

TERRY ALLISON  
Chancellor, IU South Bend  
574.520.4220  
tlalliso@iusb.edu  
iusb.edu

### FINANCIAL SUMMARY

Total Capital Expenditures	\$3,758,000
Private Funding	\$2,108,000
Local Public Funding	\$900,000
State Public Funding	\$750,000
Private/Public/Other Ratio	56/44/0





## PRODUCTIVITY

### SOUTH BEND

# St. Joseph River Hydropower Project (#ND1)

## PROJECT SUMMARY

The University of Notre Dame will construct a 1.83 megawatt hydropower facility on the city-owned dam in downtown South Bend. Power from the facility will be conveyed to campus by way of an underground transmission line traversing the 1.5 mile distance to campus. This will reduce campus carbon emissions, increase electric reliability, fix a portion of campus utility costs, provide academic research opportunities and create strong partnerships with local governments.

## IMPACT

This project demonstrates a partnership between a regional higher education institution and a local community. Outcomes of this project include increased research opportunities, which may result in improved productivity opportunities.



## FINANCIAL SUMMARY

Total Capital Expenditures	\$20,000,000
Private Funding	\$20,000,000
Local Public Funding	\$n/a
State Public Funding	\$n/a
Private/Public/Other Ratio	100/0/0

## PROJECT CONTACT

**TIM SEXTON**  
Associate Vice President for Public Affairs,  
University of Notre Dame  
574.631.1785  
sexton.30@nd.edu  
nd.edu





## PRODUCTIVITY

### ST. JOSEPH COUNTY Education Alliance (#8)

#### PROJECT SUMMARY

To ensure a high quality short and long-term pipeline of talent, St. Joseph County will work to develop a comprehensive cradle-to-career ecosystem that connects pre-K, K-12, post-secondary and career growth and transition programs to ensure positive impact and outcomes for individuals, businesses and our overall economy. Utilizing the collective impact model, this project will document the current landscape at each level - pre-K through career growth - to illustrate what currently exists and where collaborations are taking place or could be beneficial. This will reduce duplication and support creation of programs with minimal impact relative to the investment of human and funding capital. Key to the success of this effort will be establishing a model that is transparent, community-driven and sustainable.

#### IMPACT

This project will align education efforts from early childhood through post-secondary and career growth/transition programs to ensure positive impact and outcomes for individuals, businesses and the overall regional economy.



#### FINANCIAL SUMMARY

Total Capital Expenditures	\$n/a
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All expenses are operational; see project detail (Exhibit B-4) for budget and funding information

#### PROJECT CONTACT

**KATE LEE**  
Director of Talent Engagement,  
St. Joseph County Chamber of Commerce  
574.400.4030  
klee@sjchamber.org  
sjchamber.org





## PRODUCTIVITY

### PLYMOUTH

# Project Lead the Way in Marshall County (#7)

## PROJECT SUMMARY

This project will support the implementation of Project Lead The Way's world class STEM curriculum in all public and private K-12 schools in Elkhart, Marshall, and St Joseph Counties. Project Lead the Way provides STEM curriculum for the practical study of Science, Technology, Engineering and Math in grades K-12, incorporating hands-on learning, group work, problem solving and collaboration. These are all skills employers are looking for in the current workforce.

## IMPACT

This project will support STEM programming, which will support the innovation ecosystem by increasing the talent pool for in-demand jobs.



## FINANCIAL SUMMARY

Total Capital Expenditures	\$3,916,343
Private Funding	\$1,323,706
Local Public Funding	\$1,805,442
State Public Funding	\$787,194
Private/Public/Other Ratio	34/66/0

## PROJECT CONTACT

LINDA YODER  
 Director, Marshall County  
 Community Foundation  
 574.935.5159  
[lyoder@marshallcountycf.org](mailto:lyoder@marshallcountycf.org)  
[marshallcountycf.org](http://marshallcountycf.org)





## PRODUCTIVITY

### PLYMOUTH

# Job Training Center of Marshall County (#13)

## PROJECT SUMMARY

Plymouth Community School Corporation, in conjunction with the North Central Area Vocational Cooperative, Work One and Marshall County Economic Development Corporation, will build a job training center in the old Lincoln Junior High in Plymouth. This training center will educate present employees who need training, and high school students from all Marshall County Schools.

## IMPACT

This project increases residents' and business' access to workforce and job training support, which will enhance regional productivity.



## FINANCIAL SUMMARY

Total Capital Expenditures	\$10,350,000
Private Funding	\$5,600,000
Local Public Funding	\$2,140,000
State Public Funding	\$610,000
Private/Public/Other Ratio	54/40/6

## PROJECT CONTACT

**JERRY CHAVEZ**  
Executive Director, Marshall County EDC  
574.935.8499  
jerry@marshallcountyedc.org  
marshallcountyedc.org





## AMENITIES

### REGIONAL

# Urban Development Revolving Loan Fund (#14)

## PROJECT SUMMARY

A revolving loan fund will spur the development of mixed-use, urban infill development. Seed funding of \$8 million will be matched by an additional \$8 million in local public funding to leverage \$37 million of private investment toward the development of at least 367 multi-family housing units as part of mixed-use projects on urban sites within the region. The fund will provide mezzanine financing to help bridge an existing funding gap for several urban infill development /redevelopment projects.

## IMPACT

The Urban Development Revolving Loan Fund will enhance amenities and increase population and commercial density in the region's urban cores by creating more urban housing options and commercial spaces. These commercial spaces will be supported by urban residents, and will also serve as amenities that will attract new residents and spur activity in city centers. Increasing urban housing and commercial facilities directly contributes to the region's goal of high-performing communities since it creates more options for a variety of residents. This will also enhance higher education and community partnerships since students may benefit from new housing options, schools may invest in new housing options, and communities will see increased commercial and residential activity as an increasing number of students live within urban centers.

### PROJECT CONTACT

SCOTT FORD

Director of Community Investment,  
City of South Bend  
574.235.9375  
sford@southbendin.gov  
south-bend.in.us



## FINANCIAL SUMMARY

Total Capital Expenditures	\$53,330,000
Private Funding	\$37,330,000
Local Public Funding	\$8,000,000
State Public Funding	\$8,000,000
Private/Public/Other Ratio	70/30/0





## AMENITIES

### SOUTH BEND

# South Bend Blueways. East Bank Village Development Projects (#16)

## PROJECT SUMMARY

South Bend Blue Ways represents a collection of projects totaling nearly \$65 million of investment concentrated into the East Bank Village, a growing area of Downtown South Bend that is well positioned to leverage the St. Joseph River. \$17.5 million of local public funds will be invested into a series of quality of place improvements along the St. Joseph River, from the South Bend Farmers Market on the east to Seitz Park in Downtown South Bend on the west. This will leverage over \$40 million in private development into mixed-use residential projects.

## IMPACT

The project will make the East Bank Village of Downtown South Bend, including Howard Park and the adjoining stretch of the St. Joseph River, a destination that draws new residents, supports commercial development, and provides a signature amenity to the region.

*\*See Marquee Project Summary for additional detail*

### PROJECT CONTACT

**SCOTT FORD**  
 Director of Community Investment,  
 City of South Bend  
 574.235.9375  
[sford@southbendin.gov](mailto:sford@southbendin.gov)  
[south-bend.in.us](http://south-bend.in.us)



### FINANCIAL SUMMARY

Total Capital Expenditures	\$62,800,000
Private Funding	\$42,800,000
Local Public Funding	\$17,500,000
State Public Funding	\$2,500,000
Private/Public/Other Ratio	68/32/0





## AMENITIES

### SOUTH BEND

# Armory Kitchen + Lofts (#19)

## PROJECT SUMMARY

The Armory Kitchen + Lofts project will convert a vacant 20,551 square foot building into a thriving urban mixed-use development offering residential loft units and a regional culinary hub. The Armory Kitchen will provide a shared commercial kitchen for 24/7 use by food entrepreneurs, acting as a commissary for food truck operators (ordinance going through city council currently) and entrepreneurs. With booming demand for artisanal foods and drinks, shared kitchens can help entrepreneurs get into a licensed kitchen and start a business at a fraction of the traditional start-up costs. Armory Kitchen will also provide a collaborative environment, connecting “foodpreneurs” to each other and to business support and technical assistance with branding, sales and distribution. The kitchen and related classroom space will serve partnerships with IU South Bend’s emerging Hospitality Management Program and the Goodwill of Northern Indiana’s training objectives.



## IMPACT

This project will provide new residential space as well as a regional culinary hub to encourage food-related entrepreneurship and higher education collaborations focused on workforce development.

### PROJECT CONTACT

**BRAD EMBERTON**  
President, Emberton Development  
574.286.7119  
b.emberton@comcast.net

## FINANCIAL SUMMARY

Total Capital Expenditures	\$1,730,000
Private Funding	\$1,030,000
Local Public Funding	\$350,000
State Public Funding	\$350,000
Private/Public/Other Ratio	60/40/0





## AMENITIES

### SOUTH BEND

# Commerce Center Mixed Use Development (#46)

## PROJECT SUMMARY

South Bend Commerce Center Flats is a mixed use development proposed in the East Bank Village of Downtown South Bend. The complex will add 250 residential units, a full-service grocery store and a pharmacy. An office building housing several technology and medical companies currently sits on the site of this 100-year-old power plant. The additional infill opportunities on the block will be supported by excellent fiber internet connectivity through a Metronet connection (#10).

## IMPACT

This project aligns with the success factors of density, amenities, and connectivity since it will provide high-density residential and commercial options within the City of South Bend. Additionally, by being within the city and the high-density nature of the development, this facility will enable residents and visitors to easily access services and interact with others. All of these factors contribute to the region's goal of high-performing communities. Its location in the East Bank Village is walkable to the South Bend Innovation District (#1-6) and adds density to the South Bend Blueways project (#16).



## FINANCIAL SUMMARY

Total Capital Expenditures	\$35,475,000
Private Funding	\$21,285,250
Local Public Funding	\$7,095,000
State Public Funding	\$7,095,000
Private/Public/Other Ratio	60/40/0

## PROJECT CONTACT

DAVID MATTHEWS  
Owner, Matthews, LLC  
574.409.3841  
david@davidmatthews.com  
matthewsllc.com





## AMENITIES

### SOUTH BEND

# The Overlook at Notre Dame (#ND2)

## PROJECT SUMMARY

Tim Troeger of Overlook LLC will construct phase two of this apartment complex located at the east edge of Notre Dame's campus in South Bend. This expansion will add 120 apartments to the first and only community designed specifically for the MPA, Graduate and professional students, as well as researchers, staff and faculty of Notre Dame.

## IMPACT

This project creates residential and commercial density in South Bend at the edge of the Notre Dame campus. By providing opportunities for Notre Dame students, faculty and staff to live closer to South Bend, this enables connections between the campus, the community and area residents.

### PROJECT CONTACT

**TIM SEXTON**  
Associate Vice President for Public Affairs,  
University of Notre Dame  
574.631.1785  
sexton.30@nd.edu  
nd.edu  
overlooknd.com



## FINANCIAL SUMMARY

Total Capital Expenditures	\$15,000,000
Private Funding	\$15,000,000
Local Public Funding	\$n/a
State Public Funding	\$n/a
Private/Public/Other Ratio	100/0/0





## AMENITIES

### SOUTH BEND

# Embassy Suites Hotel. Eddy Street Commons at Notre Dame (#ND3)

## PROJECT SUMMARY

This project includes a 164-room Embassy Suites hotel to be constructed by Kite Realty Group in Eddy Street Commons in South Bend, just north of the University of Notre Dame campus. This is the final component of Eddy Street Commons Phase One.

## IMPACT

This project will enhance the community and its amenities by providing additional hospitality options for leisure and business visitors. With its location within the Eddy Street Commons area, it increases the density of this portion of South Bend and further enhances this area as an attractive location for living, shopping and dining.



## PROJECT CONTACT

**TIM SEXTON**  
Associate Vice President for Public Affairs,  
University of Notre Dame  
574.631.1785  
sexton.30@nd.edu  
nd.edu  
eddycommons.com

## FINANCIAL SUMMARY

Total Capital Expenditures	\$25,000,000
Private Funding	\$25,000,000
Local Public Funding	\$n/a
State Public Funding	\$n/a
Private/Public/Other Ratio	100/0/0





## AMENITIES

### MISHAWAKA

## Mishawaka Ironworks Plaza (#18)

### PROJECT SUMMARY

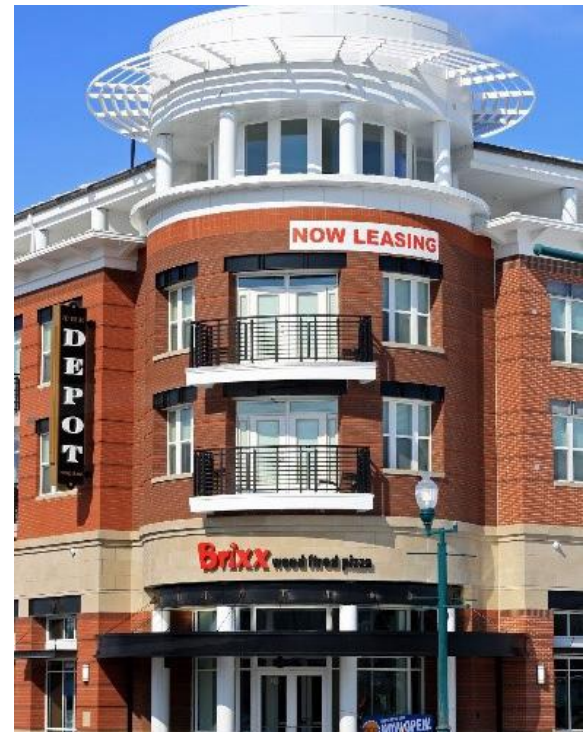
The project will consist of 233 market rate luxury residential units, 11,000 square feet of retail and restaurant space and a 390+ space parking structure. This high density project will be constructed on 2.5 acres near the Beutter Park Riverfront on the St. Joseph River in downtown Mishawaka. This development will have the same resort style amenities as can be seen at any of Flaherty and Collins other mixed use urban developments. The project will take advantage of the river views and incorporate a roof top sky bar where residents can interact with one another.

### IMPACT

This project creates density, will serve as an amenity and will increase social connectivity by creating a centrally-located space for residents and visitors to live, shop, work and play in one of the region's urban cores. These qualities support the region's goals of connectivity and high-performing communities because it will enable social connectivity and improve quality of life by providing an enjoyable environment for residents and visitors to socialize, visit and live.

#### PROJECT CONTACT

BRIAN R. PRINCE II  
Flaherty & Collins Properties  
317.816.9300  
bprince@flco.com  
flco.com



#### FINANCIAL SUMMARY

Total Capital Expenditures	\$39,050,499
Private Funding	\$23,527,967
Local Public Funding	\$7,761,266
State Public Funding	\$7,761,266
Private/Public/Other Ratio	60/40/0





## AMENITIES

### ELKHART

# Market District/Blue Zone Initiative. Downtown Elkhart (#17)

## PROJECT SUMMARY

This project includes commercial and housing development in the Market District of Downtown Elkhart. The housing component would include 400 housing units in two phases. The first phase will consist of 200 rental units on the Foundry site. The second phase will include 200 units, with a mix of rental and for sale units, along the river at the current Martin's shopping center site. Martin's Super Market would be reconstructed on a non-river frontage portion of the site. These units will provide the first new construction housing units in downtown Elkhart since the 1980s.

The mixed-use residential and commercial development takes advantage of the sites' proximity to the Elkhart River and existing RiverWalk as well as the many downtown attractions and amenities. The project will include the development of upscale housing, a redesigned commercial center and public amenities such as an extension of the existing RiverWalk Multi-Use path system and increased access points to the Elkhart and St. Joseph rivers.

## IMPACT

This project creates density, will serve as an amenity, and will increase social connectivity by creating a centrally-located space for residents and visitors to live, shop, work and play in one of the region's urban cores. These qualities support the region's goals of connectivity and high-performing communities because it will enable social connectivity and improve quality of life by providing an enjoyable environment for residents and visitors to socialize, visit and live.

### PROJECT CONTACT

CRYSTAL WELSH  
Community and Redevelopment,  
City of Elkhart  
574.294.5471 x 124  
crystal.welsh@coei.org  
cityofelkhart.org



## FINANCIAL SUMMARY

Total Capital Expenditures	\$65,000,000
Private Funding	\$39,000,000
Local Public Funding	\$13,000,000
State Public Funding	\$13,000,000
Private/Public/Other Ratio	60/40/0





## AMENITIES

### ELKHART

# Community Wellness Center and Natatorium (#23)

## PROJECT SUMMARY

This project includes construction of a \$30 million community wellness center and natatorium in the Market District of Downtown Elkhart. Key elements of this facility involve a fitness and wellness area, community gathering space, offices for local non-profit organizations, and a regional natatorium for aquatic competition, recreation and physical therapy. Studies by experts in the field of aquatics indicate the viability of a regional natatorium that will draw event participants from a radius of more than 200 miles for swim competitions. The intent is to create a “destination” facility for the Midwest, while at the same time creating a wellness, fitness and community center for our local citizens.

## IMPACT

This facility will further establish Elkhart as a high-performing community due to the amenities and access to health/wellness services it will provide. Additionally, the facility will help connect the region with others by attracting visitors to the area for events and activities.



### PROJECT CONTACT

**DR. PETE MCCOWN**  
President, Elkhart County  
Community Foundation  
574.295.8761  
[pete@elkhartccf.org](mailto:pete@elkhartccf.org)  
[elkhartccf.org](http://elkhartccf.org)

## FINANCIAL SUMMARY

Total Capital Expenditures	\$32,000,000
Private Funding	\$20,000,000
Local Public Funding	\$6,000,000
State Public Funding	\$6,000,000
Private/Public/Other Ratio	63/37/0





## AMENITIES

### ELKHART

## Elkhart Field Sports Complex (#24)

### PROJECT SUMMARY

Located in the Market District of Downtown Elkhart, the Field Sports Complex will create six public outdoor multi-use sports fields and a public championship field venue that would, in conjunction with other field assets in the region, serve as home to regional sports tourism events. Further, this would support the private development of an indoor sports complex to accommodate both turf and court activities and a new hotel to serve the complex and downtown demand.

The Elkhart Field Sports Complex is being proposed as a part of a complete new vision for Downtown Elkhart's RiverWalk District as a Blue Zone centered on the creation of sports and recreation facilities that will not only meet local needs, but serve as an attraction for regional travel sports opportunities. The Field Sports Complex will be developed in conjunction with the Community Wellness Center & Natatorium, along with a new Marina/ River Access development to transform the part of the RiverWalk District North of East Jackson Blvd. The project takes advantage of floodway issues that limit redevelopment opportunities for large pieces of the real estate in this district.

### IMPACT

The Elkhart Field Sports Complex will serve as an amenity for area residents and will serve as an attraction for regional travel sports activities. It will also serve as a resource to attract families to live in the city of Elkhart.

#### PROJECT CONTACT

MIKE HUBER  
Elkhart County Convention  
and Visitors Bureau  
800.262.8161  
mike@amishcountry.org  
amishcountry.org



#### FINANCIAL SUMMARY

Total Capital Expenditures	\$29,350,000
Private Funding	\$20,000,000
Local Public Funding	\$5,350,000
State Public Funding	\$4,000,000
Private/Public/Other Ratio	68/32/0





## AMENITIES

### ELKHART

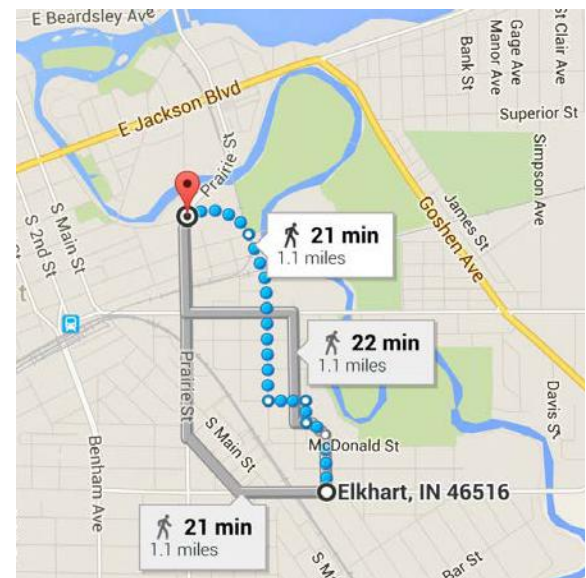
# RiverWalk Mapleheart Connection (#32)

## PROJECT SUMMARY

The City of Elkhart has a world class botanical garden, state-of-the-art theatre, several local museums, great restaurants and an expansive parks system that can all be enjoyed on foot along the RiverWalk Culture Trail. This project focuses on connecting the gaps between trail systems in the Market District area. Currently, the RiverWalk ends near the intersection of Prairie St. and Waterfall Drive. The Mapleheart Trail begins one mile to the south, at the intersection of Indiana Ave. and Sterling Ave. This project will connect the downtown Elkhart RiverWalk and the Mapleheart Trail. This connection will enable an extensive regional trail system since the RiverWalk already connects to Elkhart's bicycle routes and the Mapleheart Trail connects to Goshen's trail system, including the Pumpkinvine which accesses Middlebury and Shipshewana.

## IMPACT

This project will link four communities via multi-use trails, serving as an amenity for area residents and visitors.



## FINANCIAL SUMMARY

Total Capital Expenditures	\$900,000
Private Funding	\$540,000
Local Public Funding	\$180,000
State Public Funding	\$180,000
Private/Public/Other Ratio	60/40/0

## PROJECT CONTACT

KYLE HANNON  
President, Elkhart Chamber of Commerce  
574.293.1531  
khannon@elkhart.org  
elkhart.org





## AMENITIES

### ELKHART

# Hotel Elkhart Development (#20)

## PROJECT SUMMARY

This project will redevelop the Cornerstone Building at 500 South Main Street in downtown Elkhart to include a 60-room boutique Hotel with a mixed-use component and a penthouse ballroom.

## IMPACT

This project will enable residential and commercial activity and density within downtown Elkhart by attracting residents and visitors and serving as an amenity to the community.



## FINANCIAL SUMMARY

Total Capital Expenditures	\$11,550,000
Private Funding	\$8,144,000
Local Public Funding	\$1,560,000
State Public Funding	\$1,846,000
Private/Public/Other Ratio	71/29/0

## PROJECT CONTACT

CRYSTAL WELSH  
Community and Redevelopment,  
City of Elkhart  
574.294.5471 x 124  
crystal.welsh@coei.org  
cityofelkhart.org





## AMENITIES

### ELKHART

# Indoor & Outdoor Entertainment and Exhibition Space (#26)

## PROJECT SUMMARY

The project will include a hotel, convention center, office building and stadium. The event space will house horse auctions and events like tractor pulls, concerts, sporting events and conventions. The space will also be large enough to accommodate Recreational Vehicle events.

## IMPACT

The entertainment arena and activity space will be an amenity for area residents and will support the region's goal of high-impact communities by providing a space for resident recreation and tourism attraction. This space will attract regional and national events and would create a demand for increased economic development with a need for shopping, hotels and restaurants.



### FINANCIAL SUMMARY

Total Capital Expenditures	\$33,000,000
Private Funding	\$28,870,280
Local Public Funding	\$2,064,860
State Public Funding	\$2,064,860
Private/Public/Other Ratio	87/13/0

### PROJECT CONTACT

**BARKLEY GARRETT**  
Economic Development, City of Elkhart  
574.294.5471  
barkley.garrett@coei.org  
cityofelkhart.org





## AMENITIES

### GOSHEN

# Goshen Theater Restoration (#22)

## PROJECT SUMMARY

The Goshen Theater, a 750-seat historic performing-arts theater, closed in 1968 and has since suffered decay, water damage, historic façade removal and unresolved maintenance needs. This project will fully renovate the facility, saving the community's shared heritage and bringing new life to the region. Restoring the historic cultural amenity will provide a source of culture and entertainment for the community and bolster the economic activity of the downtown.

## IMPACT

This project brings activity to the city center, offers jobs, enhances the city's creative vitality and secures Elkhart County's reputation as a community that values culture.



## FINANCIAL SUMMARY

Total Capital Expenditures	\$12,500,000
Private Funding	\$6,000,000
Local Public Funding	\$4,000,000
State Public Funding	\$2,500,000
Private/Public/Other Ratio	48/52/0

## PROJECT CONTACT

GINA LIECHTY  
Downtown Goshen & Eyedart  
574.312.5677  
gina@eyedart.com  
cityonthego.org





## AMENITIES

### GOSHEN

## Goshen Amphitheater (#25)

### PROJECT SUMMARY

As the final piece of the River Race Area redevelopment, this project will construct an open-air amphitheater on the west side of the Millrace Canal. The site is currently 9-acres of greenspace adjacent to the City's greenway and blocks from historic downtown Goshen. The site will maintain a natural feel with an open stage and seating in the grass offering a "public space". Its proximity to trails and downtown make it a walkable destination for many and allow for us to showcase this valuable property in a way to enhance Goshen, attract visitors and provide an amenity that is currently lacking in Goshen.

### IMPACT

This project will tie downtown Goshen with the greenway space adjacent to the Millrace Canal, drawing both Goshen residents and visitors by providing a feature that does not currently exist within the community.



### FINANCIAL SUMMARY

Total Capital Expenditures	\$1,250,000
Private Funding	\$750,000
Local Public Funding	\$250,000
State Public Funding	\$250,000
Private/Public/Other Ratio	60/40/0

### PROJECT CONTACT

BECKY HERSHBERGER  
Redevelopment, City of Goshen  
574.533.3579  
beckyhershberger@goshencity.com





## AMENITIES

### GOSHEN

## Apex Climbing & Fitness (#27)

### PROJECT SUMMARY

Apex Climbing and Fitness will be the first full-featured indoor climbing facility in the Michiana area, providing bouldering, top-roping and lead climbing as core offerings. Over time they will provide climbing-related activities such as a ropes challenge course, parkour, ninja warrior, Crossfit, basic cardio equipment, massage, yoga, after school programs, day camps for kids and special events such as birthday parties and sleepovers. Apex Climbing and Fitness will bring people together to achieve new heights. Goshen currently has no year-round family-oriented fitness facility.



### IMPACT

The Apex Climbing and Fitness facility will be an amenity for residents and will support the region's goal of high-performing communities by providing a space for resident recreation, health management and tourism attraction.

#### PROJECT CONTACT

MICHAEL DICKENS  
Apex Climbing  
574.538.7176  
Michael@apexgoshen.com  
apex.rocks

### FINANCIAL SUMMARY

Total Capital Expenditures	\$3,500,000
Private Funding	\$2,500,000
Local Public Funding	\$300,000
State Public Funding	\$700,000
Private/Public/Other Ratio	71/29/0





## AMENITIES

### PLYMOUTH

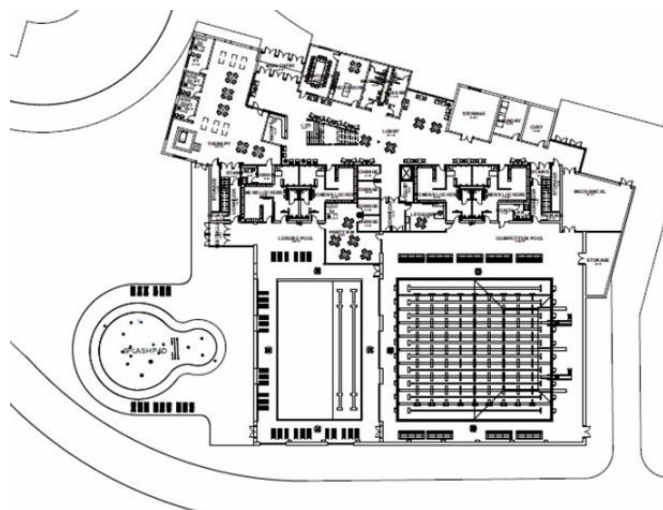
# Plymouth Aquatics Center in Marshall County (#29)

## PROJECT SUMMARY

Plymouth Aquatics Center is a facility providing aquatics programming for recreation, education, health, rehabilitation and competitive sports to the Northern Indiana Region on a year round basis. In addition to three pools (ten lane 25 yard recreation and competition, four to six lane warm water teaching, exercise, and, recreation, warm water therapy pool for rehabilitation), an outpatient rehabilitation suite and community accessible exercise facility are proposed. Together with the Elkhart Natatorium (#23) and existing assets, the region will thrive as a swimming sports tourism destination.

## IMPACT

This project will house recreation, safety/education, health/wellness and competitive aquatics programs within a single facility in the region. These are features and amenities desirable to businesses and families when choosing communities they would like to locate in. Together with the Natatorium in Elkhart and other facilities in the region, it will help draw national swim events.



## FINANCIAL SUMMARY

Total Capital Expenditures	\$14,062,000
Private Funding	\$8,437,200
Local Public Funding	\$2,812,400
State Public Funding	\$2,812,400
Private/Public/Other Ratio	60/40/0

## PROJECT CONTACT

ANGELA DRURY

Executive Director, Plymouth Sharks  
574.780.2188

presidentplymouthsharks@gmail.com  
plymouthtownship.org





## AMENITIES

### PLYMOUTH

# Tennis Courts & Park Pavilion Expansion in Marshall County (#30)

## PROJECT SUMMARY

The Plymouth Youth Tennis and Pickle Ball Courts & Park Pavilion Expansion would add four new 36' courts for a youth league, a new Senior Pickle Ball League and regional competitions, as well as enhance and expand the adjacent Park Pavilion for purposes of regional tournament management, city lesson & league operations and general community enjoyment of all generations.



## IMPACT

This project will enhance the reputation of the Plymouth community, will serve as an amenity for area residents, and will act as a draw for athletes and families in the region.

### PROJECT CONTACT

MIKE HITE  
Superintendent, Plymouth Parks  
574.936.2876  
parks@plymouthin.com

### FINANCIAL SUMMARY

Total Capital Expenditures	\$416,000
Private Funding	\$225,000
Local Public Funding	\$83,000
State Public Funding	\$83,000
Other Funding	\$25,000
Private/Public/Other Ratio	54/40/6





## AMENITIES

### MARSHALL COUNTY Trail System (#34)

#### PROJECT SUMMARY

This project to develop the Marshall County Trail System will create a regional trail system by linking the following: Lake Max Bike Trail, Culver/Plymouth, extension to Ancilla and connection to Nickle Plate Trail (Rochester to Kokomo). Plymouth has already implemented Phase One of its Advanced Greenway Trail and has funded Phase Two, which will be constructed in 2017. Phase Three is planned to take the trail from Riverpark Square to Southgate Park.

#### IMPACT

This project will serve as an amenity to increase the quality of life in Plymouth to help attract visitors, residents, and employees.



#### FINANCIAL SUMMARY

Total Capital Expenditures	\$2,890,000
Private Funding	\$1,290,000
Local Public Funding	\$800,000
State Public Funding	\$800,000
Private/Public/Other Ratio	45/55/0

#### PROJECT CONTACT

RALPH BOOKER  
Plan Director, Marshall  
County Plan Commission  
574.935.8540  
rbooker@co.marshall.in.us  
co.marshall.in.us





## PRODUCTIVITY

### MARSHALL COUNTY

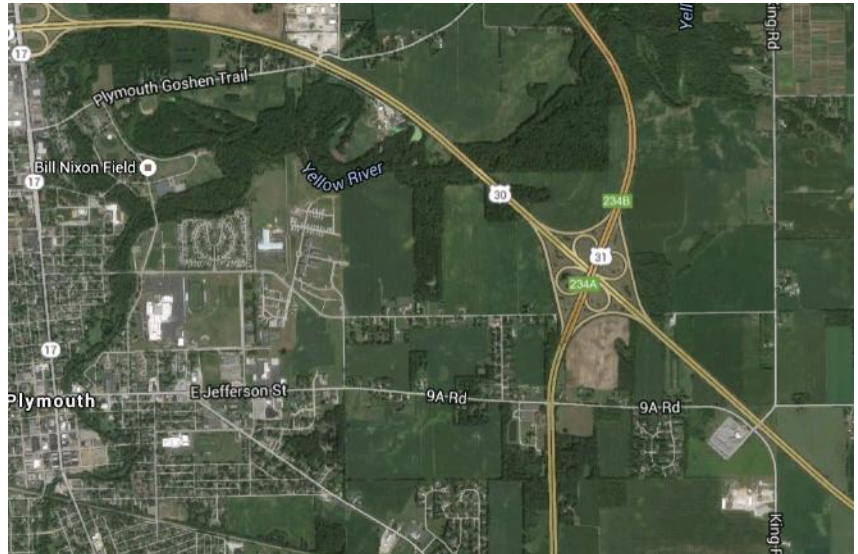
## Infrastructure Development (#36)

### PROJECT SUMMARY

This project includes water and sanitary sewer trunk line, electric distribution system improvements, and roadway construction specifically for industrial development and attraction. The project will prepare several greenfield sites for new development due to increased utility capacities and access resulting in an increase in the number of businesses that will expand to Marshall County.

### IMPACT

This project will increase infrastructure capacities and access to greenfields, which will improve the regional economy as more businesses will expand into Marshall County due to being prepared with the necessary infrastructure foundation.



#### FINANCIAL SUMMARY

Total Capital Expenditures	\$14,100,000
Private Funding	\$7,460,000
Local Public Funding	\$2,820,000
State Public Funding	\$2,820,000
Other Funding	\$1,000,000
Private/Public/Other Ratio	53/40/7

#### PROJECT CONTACT

JERRY CHAVEZ  
Executive Director, Marshall County EDC  
574.935.8499  
jerry@marshallcountyedc.org  
marshallcountyedc.org





## PRODUCTIVITY

### MARSHALL COUNTY

# Manufacturing Shell Buildings (#40)

## PROJECT SUMMARY

This project is being developed to attract new business and industry, and fill the void in the market place for “move in” ready buildings. Such buildings will adequately meet the needs of business and industry, and allow Marshall County to respond to more leads and be more competitive in attraction projects. The project includes the construction of 4 shell buildings in various communities throughout the County.



## IMPACT

This project will improve the regional economy by allowing Marshall County to be better prepared to respond to time-sensitive business attraction leads to draw investment from outside of Indiana.

### PROJECT CONTACT

**JERRY CHAVEZ**  
Executive Director, Marshall County EDC  
574.935.8499  
jerry@marshallcountyedc.org  
marshallcountyedc.org

### FINANCIAL SUMMARY

Total Capital Expenditures	\$12,500,000
Private Funding	\$8,750,000
Local Public Funding	\$1,250,000
State Public Funding	\$2,500,000
Private/Public/Other Ratio	70/30/0





## AMENITIES

### MARSHALL COUNTY

## Boys & Girls Club – New Clubhouse (#41)

### PROJECT SUMMARY

This project is being developed to address community needs and to make the current Club more efficient. The dilapidated old restaurant building that currently houses the Club will be demolished and the new Clubhouse will be dedicated to innovative new programming and will be energy and resource efficient. The one floor building will provide safe, attractive, supervised and accessible spaces for youth. The Boys & Girls Club program space will be designed to provide youth in our community with age-appropriate youth development programming that is aimed at helping today's youth to develop their full potential as productive, caring and responsible citizens.

### IMPACT

This project will help make Marshall County a better place to work and raise a family, aiding families in providing a positive place for their children to learn and grow. It will also serve as a tool to help integrate more Hispanic residents into the population served by the Club.



### FINANCIAL SUMMARY

Total Capital Expenditures	\$2,500,000
Private Funding	\$1,650,000
Local Public Funding	\$350,000
State Public Funding	\$500,000
Private/Public/Other Ratio	66/34/0

### PROJECT CONTACT

**BILLIE TREBER**  
Boys & Girls Club of Marshall County  
574.936.0660  
billiet@bgcmarshallcounty.com  
bgcmarshallcounty.com





## AMENITIES

### MARSHALL COUNTY Neighborhood Co-Operative (#42)

#### PROJECT SUMMARY

This is a pilot project that will enhance traditional, charitable services by incorporating a co-operative business model; whereby, client-recipients of our services will be invited to become members who contribute to and participate in targeted activities that are designed to build pathways out of poverty and into self-sufficiency. Members, volunteers, and staff will work collaboratively to deliver enhanced services: a charitable agency provides the venue, community investment, and activities. This framework will provide new perspectives and opportunities in poverty-based services.

#### IMPACT

This project will enhance traditional, charitable services by incorporating a co-operative business model, whereby client-recipients of services will be invited to become members who contribute to and participate in targeted activities that are designed to build pathways out of poverty and into self-sufficiency.



#### FINANCIAL SUMMARY

Total Capital Expenditures	\$12,500
Private Funding	\$7,500
Local Public Funding	\$2,500
State Public Funding	\$2,500
Private/Public/Other Ratio	60/40/0

#### PROJECT CONTACT

SARA HILL  
Executive Director, Marshall County  
Neighborhood Co-Operative  
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mcncdirector@gmail.com  
mcnc.org



A photograph of a Black male scientist wearing a white lab coat and safety glasses, working in a laboratory. He is looking towards the camera with a slight smile. The background shows various laboratory equipment, including a microscope and a rack of test tubes. The image is overlaid with a green tint.

# STAKEHOLDERS, EXECUTION & STRUCTURAL CHANGES



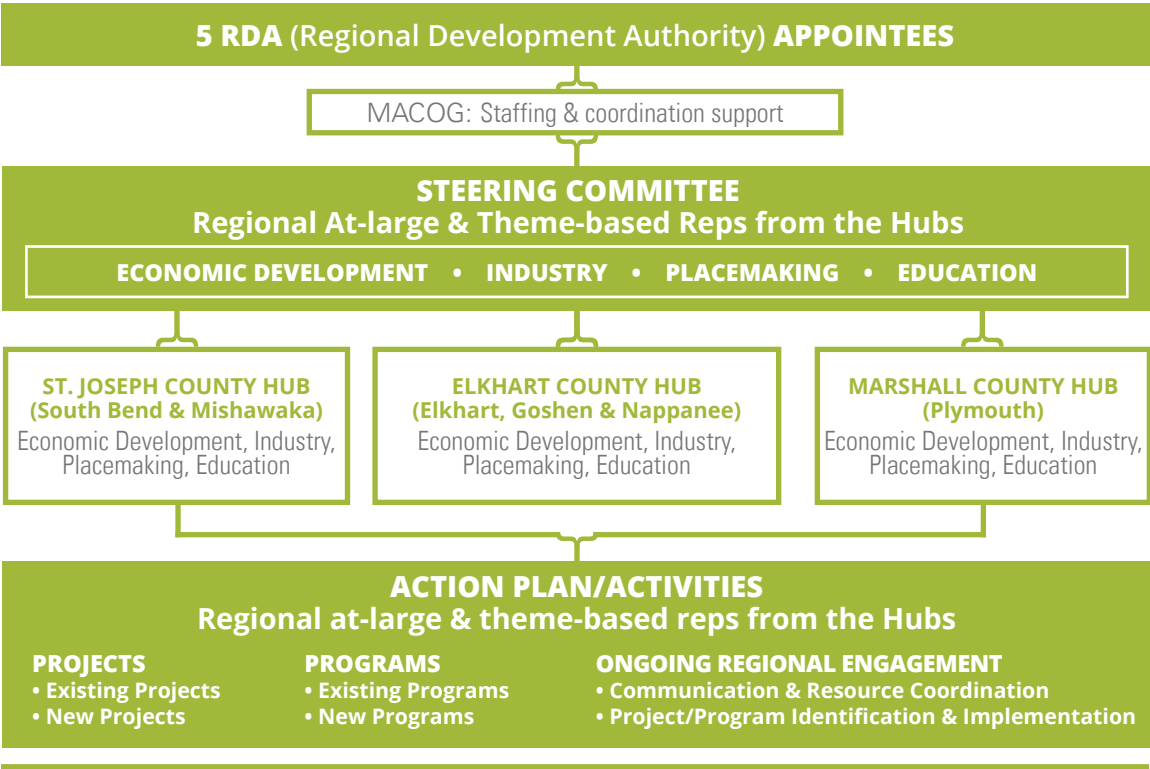
# STAKEHOLDERS, EXECUTION & STRUCTURAL CHANGES

## Regional Development Authority

In June of 2015, the fiscal bodies of Elkhart, Marshall and St. Joseph counties adopted an ordinance to establish the Northern Indiana Regional Development Authority (RDA). The RDA serves more than half a million people in 22 interconnected cities and towns in Northern Indiana.

The second and third class cities of Elkhart, Goshen, Mishawaka, Nappanee, Plymouth and South Bend have joined the Development Authority. The following towns are also located within the RDA geography: Argos, Bremen, Bristol, Bourbon, Culver, Indiana Village, Lakeville, La Paz, Middlebury, Millersburg, New Carlisle, North Liberty, Osceola, Roseland, Wakarusa and Walkerton.

### THE NORTHERN INDIANA REGIONAL DEVELOPMENT AUTHORITY





## STAKEHOLDERS, EXECUTION & STRUCTURAL CHANGES

### Partners in Prosperity

While not formal members of the Northern Indiana RDA, LaPorte and Kosciusko counties in Indiana and Berrien and Cass counties in Michigan are key members of the region due to social, economic, planning and infrastructure linkages. These counties are “Partners in Prosperity” that collaborate with the RDA on various issues that are strategically beneficial to the RDA and the respective counties. The greater seven-county region collaborates on many initiatives that will continue to be enhanced in the future, including:

- Coordinated regional marketing and business recruitment activities (Michiana Partnership promotion in Chicago market. Notre Dame and Lake Michigan special events, which demonstrate quality of life and vibrancy across the greater region).
- Resource and knowledge sharing of regional workforce development tools (commuting patterns, job training).
- Resource and knowledge sharing of regional economic trends across Northern Indiana (demonstrating the true picture of the economy and resulting opportunities).
- Coordinated effort toward intergovernmental communication on economic development policy initiatives (i.e. Northern Indiana Chamber Coalition, Northern Indiana Mayors Roundtable and Northern Indiana Legislators Caucus).
- Additionally, Kosciusko County is a member of the Michiana Area Council of Governments (MACOG) region. This plan refers to Kosciusko County and their continued role in the region’s development based on these connections and opportunities for ongoing collaborations.

### Inter-Regional Collaboration

The Northern Indiana RDA is actively engaged in a shared project —South Shore Train—with the Northwest Indiana RDA, the Northwest Indiana Forum and LaPorte County leadership. The South Shore Train project links communities across Northern Indiana to the Chicago market, which is a huge opportunity for both regions. Additional detail on this inter-regional initiative is included in the Marquee Project Summary. Both regions recognize that by working together, they will be able to most efficiently and effectively leverage this asset—by improving the frequency, reliability and speed of this critical linkage between South Bend and Chicago, and all of the communities in-between.



## STAKEHOLDERS, EXECUTION & STRUCTURAL CHANGES

### Participating Stakeholders

A more detailed list of the participating stakeholders and their roles in planning and executing the Innovate Indiana plan, including names and contact information, is attached (Exhibit A).

- A-1 Steering Committee Members & Investors
- A-2 Community Engagement
- A-3 Key Leader Interviews
- A-4 Project Team Consultants
- A-5 Elected Officials Engagement
- A-6 Media Engagement
- A-7 RDA Board Member Profiles & Oaths
- A-8 RDA Bylaws
- A-9 MACOG Staffing Services
- A-10 County RDA Ordinances
- A-11 Written Agreement of Board Appointees

### Organization and Leadership

The executives of the Members of the Development Authority appointed the following individuals to the Board of the Development Authority, all of whom meet the criteria defined in the state legislation:

- John Affleck-Graves,  
Executive Vice President,  
University of Notre Dame
  - Pete McCown,  
President, Elkhart County Community  
Foundation
  - Regina Emberton,  
President, Michiana Partnership
  - John DeSalle,  
V.P. Engineering & Manufacturing, Hoosier  
Racing Tire Corp.
  - Dallas Bergl,  
CEO, INOVA Federal Credit Union
- Full member profiles and oaths are attached (Exhibit A-7).

The RDA adopted bylaws (Exhibit A-8) and elected the following officers at their August 18th 2015 meeting: CHAIR: John Affleck-Graves, VICE CHAIR: Regina Emberton and SECRETARY-TREASURER: Dallas Bergl.

The Northern Indiana RDA is ultimately responsible for updating the plan and project portfolio, managing the budget and overseeing plan execution. This will be done with the staffing and financial support of MACOG and the Michiana Partnership. MACOG has been engaged to provide staffing services for the RDA and is doing so on an in-kind basis to support the overall economic development goals (Exhibit A-9).



## STAKEHOLDERS, EXECUTION & STRUCTURAL CHANGES

The RDA has engaged Krieg DeVault to provide legal services, such as attending board meetings contract review, reviewing minutes and generally advising and counseling the Board and the RDA with respect to applicable laws and regulations.

The RCNI Steering Committee will continue to work closely with the RDA board to manage the overall project portfolio coordination and cross-hub communication. Steering Committee members will be responsible for monitoring and reporting on projects, identifying funding opportunities or gaps, indicating new project opportunities and recognizing potential programmatic and physical project partnerships between the locations within the region.

Projects and initiative unique to each hub city will be managed and developed by a local advisory committee at the hub city level. Members of the Steering Committee and hub city level committees will represent at least one of four interest areas to include industry, education, placemaking and/or economic development. A minimum of one member of each hub-city committee will serve on the RCNI Steering Committee.

Industry subcommittees will focus on developing and implementing programs and investments that support and advance local industry in terms of entrepreneurship, R&D, growth and retention. Education subcommittees (such as Horizon Education Alliance in Elkhart County, St. Joseph

County Education Alliance and WorkOne) will coordinate and develop programs and investments that ensure the region's students and workforce are equipped for the best opportunities and meet local business needs. Placemaking subcommittees will focus on programs, projects and investments that maintain and enhance the region's quality of life in terms of cultural, urban and recreational amenities. Economic development subcommittees, coordinated by Michiana Partnership and MACOG, will coordinate and develop programs and investments that enhance internal and external perceptions of the region, support the innovation and entrepreneurship ecosystem, and ensure the right partnerships are in place to support regional needs.

While a formal operational model will be refined in coming months, it is anticipated that at least one person in each hub will serve as an Innovation District Liaison. Their duties will include outreach to existing industry, entrepreneurs and capital resources, and identifying innovation or market challenges and opportunities. They will collect information and match or refer regional innovation and economic development resources to those specific needs and opportunities. They will serve as a point of contact for inquiries and communications between and among stakeholders in each innovation hub.



# BENCHMARKING & MEASUREMENT



## BENCHMARKING & MEASUREMENT

Northern Indiana will use Akron, Ohio; Durham, North Carolina; and Grand Rapids, Michigan as long-term benchmarks for competition and success. These communities were chosen based on their aspirational achievements demonstrated regional cities successes, and social, economic and geographic similarities to the Northern Indiana Region.

Akron like Northern Indiana, is close to a major urban area (Cleveland), has a history of manufacturing excellence and has

invested in innovation and entrepreneurship initiatives.<sup>[30]</sup> Durham is a Regional Cities case study community that invested in quality of place by retaining a professional sports team and renovating existing infrastructure to create the American Tobacco complex that today houses higher education and innovation-related tenants and partners. Grand Rapids has seen significant investment in recent years and had the ninth fastest-growing economy in the United States in 2014.<sup>[31]</sup>

## Metrics and Monitoring

Quality of place metrics measuring the economy, environment, diversity and society will be used to establish the region's baseline and monitor ongoing performance against benchmark communities

(figure 24, 25, 26 & 27). Where possible, data from the participating counties will be combined to create a regional entity for comparison against benchmark Metropolitan Statistical Areas.

FIGURE 24

### NORTHERN INDIANA ENVIRONMENT METRICS

	INDICATOR	RCI QOP METRIC	DESCRIPTION
ENVIRONMENT	Commuting Without a Car, Percent	Yes	Measure of physical activity as well as environmental consciousness. CAUTION: could be a measure of economic depravity where people bike to work or take public transportation due to need and not preference.
	Air Quality Index Median	No	Measure of overall air quality.
	Urban to Rural Population	No	A measure of the balance between the urban population and the rural population. Urban areas will be considered to be tract incorporated places.

<sup>[30]</sup> [http://urban.csuohio.edu/publications/center/center\\_for\\_economic\\_development/Akron\\_Regional\\_Analysis-Consolidated.pdf](http://urban.csuohio.edu/publications/center/center_for_economic_development/Akron_Regional_Analysis-Consolidated.pdf)

<sup>[31]</sup> [http://www.brookings.edu/~media/Research/Files/Reports/2015/01/22-global-metro-monitor/bmpp\\_GMM\\_final.pdf?la=en](http://www.brookings.edu/~media/Research/Files/Reports/2015/01/22-global-metro-monitor/bmpp_GMM_final.pdf?la=en)



## BENCHMARKING & MEASUREMENT

The RDA, MACOG, Michiana Partnership and the Steering Committee will calculate the initial baseline and update the metrics on an annual basis (as applicable) to monitor the performance of the region in comparison to benchmark communities.

The RDA and Steering Committee will receive regular updates from county-based subcommittees about project performance and opportunities within the region. Benchmarking results will serve as one of the review factors for these projects.

FIGURE 25

### NORTHERN INDIANA ECONOMY METRICS

	INDICATOR	RCI QOP METRIC	DESCRIPTION
ECONOMY	Employment Growth 1990–Current	Yes	Measures the change/growth in total number of persons employed within the defined area of an MSA between 1990 and the most current period available.
	Per Capita Income as a Percent of US	Yes	Measures the relative position of the per capita income in a particular MSA or region to the US. Example: A value of 75% means that an MSA or region had Per Capita Incomes that was 75% of US average.
	GDP Growth 2001–Current	Yes	Measures the change in the economic output of an MSA between 200 and the most current period available.
	Vacant Units as a Percentage of All Housing Units	Yes	Measures the health of the startup and entrepreneurial industry in an MSA including investment, access to capital and other supports.
	Change in Median Household Income, 2000–Current	Yes	Measures the concentration of arts and/or access to the arts in a similar way that physicians per capita is a measure of access to healthcare.
	Median Home Value to Household Income	Yes	Measures how many times the median household income goes into the median household value. Example: A value of 2.5 means that the median home is valued at 2.5 times what the median household earns.
	Startups, Percent of Total Firms	Yes	Measures the level of startup activity in the region as a share of total firms.
	Percent in Poverty	Yes	Although measures of poverty have changed with time, that change has generally been to keep in line with the changing realities of the poor. Measures the economic and social condition of impoverishment.



FIGURE 26

## NORTHERN INDIANA DIVERSITY METRICS

	INDICATOR	RCI QOP METRIC	DESCRIPTION
DIVERSITY	Non-White Only Population	Yes	Measure of racial diversity.
	Foreign Born	Yes	More than a measure of diversity, this measure of place captures something about the overall attractiveness of an MSA and how well the MSA welcomes and integrates new residents.
	Proprietors Per 10,000 Employees	Yes	Measure of the rate of business owners and entrepreneurship in an economy.
	Small Business Percent	Yes	Measures the health of the startup and entrepreneurial industry in an MSA including investment, access to capital and other supports.
	Arts Workers Per 10,000 Employees	Yes	Measures the concentration of arts and/or access to the arts in a similar way that physicians per capita is a measure of access to healthcare.
	Families Share of Total Households	Yes	Measures shifts in the demographic makeup of households.
	Ratio of Working Age to 65 and Older	Yes	A measure of economic sustainability. Indicates the ease at which workers who are retiring will be supported by and replaced by those who are still of working age.
	Percent of Minority or Women-Owned Businesses	Yes	A measure of economic diversity, equality of opportunity and ease of doing business for women and minority populations.

FIGURE 27

## NORTHERN INDIANA SOCIETY METRICS

	INDICATOR	RCI QOP METRIC	DESCRIPTION
SOCIETY	Population Growth 1990–Current	Yes	Measures the growth in total number of people occupying the MSA or region between 1990 and the most recent period available. Beware that MSA definitions may have changed during this time period, thus increasing population by definition.
	In-migration	No	Measure of the proportion of existing residents that moved to the area from another state or abroad within the past year.
	Bachelor's Degree or Higher Population (25 years and over)	Yes	Measures the level of talent in a population.
	Associate's Degrees (25 years and over)	Yes	Measure of skilled labor in a population. AA degrees are usually trades, skilled labor and represent a different level of workforce development.
	Public School Students Receiving Free or Reduced Price Lunches	No	Measure of the concentration of poverty among children: – By measuring the 2-year change, this variable could capture the change in incidence of childhood poverty. – Since this data is available primarily at the county level (and not MSA level), this may be an internal indicator for RCNI to measure and monitor regional social changes.



# ADDITIONAL SUPPORT



# ADDITIONAL SUPPORT

## Exhibit A: Stakeholders & Execution

- A-1 ..... Steering Committee Members & Investors
- A-2 ..... Community Engagement
- A-3 ..... Key Leader Interviews
- A-4 ..... Project Team Consultants
- A-5 ..... Elected Officials Engagement
- A-6 ..... Media Engagement
- A-7 ..... RDA Board Member Profiles & Oaths
- A-8 ..... RDA Bylaws
- A-9 ..... MACOG Staffing Services
- A-10 ..... County RDA Ordinances
- A-11 ..... Written Agreement of Board Appointees

## Exhibit B: Project Portfolio

- B-1 ..... Index of All Projects
- B-2 ..... Project Calendar
- B-3 ..... IEDC ROI Analysis Summary
- B-4 ..... Project Applications with detail (2 pages + per)
- B-5 ..... Renaissance District: No 113 Project Summary

## Exhibit C: Supplements

- C-1 ..... Talent Engagement Letter from Mayor Buttigieg
- C-2 ..... The Economist Magazine Article
- C-3 ..... Notre Dame Economic Impact Report
- C-4 ..... Notre Dame Magazine (featuring Rising from the Ashes article)



### A-1-a REGIONAL CITIES OF NORTHERN INDIANA STEERING COMMITTEE MEMBERS

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## A-1-b Regional Cities Initiative Project Investors

Industry

Indiana Michigan Power  
 Kem Krest  
 Holladay Properties  
 Bradley Co

Chamber/Economic Development /Convention & Visitors Bureau

St. Joseph County Chamber of Commerce  
 Visit South Bend Mishawaka  
 South Bend Region Economic Development Corporation  
 Elkhart Chamber of Commerce  
 Goshen Chambers of Commerce  
 Elkhart County Convention and Visitors Bureau

Philanthropic

St. Joseph County Community Foundation  
 Elkhart County Community Foundation  
 Marshall County Community Foundation  
 Kosciusko County Community Foundation  
 Garatoni Foundation  
 Anonymous Foundation

Academia

University of Notre Dame  
 IU South Bend

In Kind Project Management Support

Michiana Partnership  
 Michiana Area Council of Governments (MACOG)  
 Krieg DeVault  
 enFocus  
 South Bend Region Economic Development Corporation



A-2 COMMUNITY ENGAGEMENT	
REGIONAL CITIES INITIATIVE	EXPOSURE
INFORMING MEETINGS & PRESENTATIONS	2,706
8.18 Regional Site Visit and Networking Reception with IEDC	50
8.18 RDA Board Meeting - Public	20
8.17 Downtown South Bend Board Update	25
8.13 Elkhart Chamber Lunch with Governor Pence - Presentation	200
8.6 Regional Business Outreach Group Presentation	10
7.30 Michiana Partnership Board Meeting Update	5
7.29 South Bend Office of Sustainability	2
7.28 RDA Board Meeting - Organizational	15
7.9 Northwest IN Region - South Shore Train project	10
7.9 Regional Works Council Presentation	15
7.9 Downtown South Bend Restaurants Attractions and Shops (RAS) Presentation	25
7.6 Marshall County Commission Meeting	10
7.1 LaPorte County and NWI Forum Leadership Meeting	3
6.23 St. Joseph County Commission Meeting	15
6.15 Executive Forums of Northern IN - CEO Engagement Mtg.	15
6.13 Elkhart Co Council Presentation of Ordinance	15
6.9 SJ Co Council Presentation of Ordinance	10
6.8 Marshall Co Council Presentation of Ordinance	10
6.2 RCI Steering Committee Meeting	40
6.1 Marshall Co Commissioners Mtg Presentation on RCI/RDA	5
5.28 SJ Chamber Networking Lunch, Presentation on MP & RCI	50
5.26 SJ Co Council Cmt. Mtg, Presentation on RCI/RDA	10
5.22 Goshen Rotary, Presentation on MP & RCI	60
5.20, Update to Metronet Board of Directors	15
5.19 Economic Club of Michiana, Presentation on MP & RCI	40
5.18 Elkhart Lunch Rotary Group, Presentation on MP & RCI	100
5.18, Meeting with Representatives from regional financial institutions	10
5.15 Elkhart Chamber Economic Dev. Council Update	15
5.14 RCI Steering Cmt. Mtg, Bethel College	40
5.13 MACOG Meeting, Bethel	50
5.12 Marshall Co Dev for the Future Mtg & Presentation on RCI	20
5.6 Regional Business Outreach Roundtable at Innovation Park	20
5.1 Governor Pence Event, The Exchange	100
4.27 Meeting with Real Estate Developers, Commercial Lenders, and downtown/municipal organizations	15
4.17 Elkhart Chamber ED Council Mtg	20
4.16 Work Group 2b, Marshall	15
4.14 Elected Officials Reception	40
4.7 Work Group 2, Marshall	10
4.6 Goshen Chamber Public Policy - Presentation on MP & RCI	15



A-2 COMMUNITY ENGAGEMENT	
REGIONAL CITIES INITIATIVE	EXPOSURE
INFORMING MEETINGS & PRESENTATIONS	2,706
4.2 Work Group 2, St. Joseph	40
4.2 Work Group 2, Elkhart	40
3.31 Tour of Renaissance District	2
3.27 SJC Third House	5
3.19 RCNI Forum @ Gillespie w/ 100 attendees	100
3.18 Statehouse visit/Gov Pence with chambers	15
3.16 SJC Project Review Mtg & Chamber Board update	20
3.9 Presented to Northern IN Chamber Coalition	10
3.4 Elkhart Co Work Group	40
3.4 SJC Co Work Group	30
3.3 Kosciusko Co Work Group	20
2.27 SJC Third House	5
2.17 RCI S.C. Mtg	40
2.10 Dave Findlay Lake City Meeting	1
2.10 Mtg with R. Yakym and M. Neal from Bradley Co	2
2.4 Greg Vollmer, Work One	1
2.3 SJC Chamber Salute to Business lunch	800
2.2 Elkhart Chamber Presentation	25
Jan-Feb Conducted Key Stakeholder Interviews	40
1.29 Elkhart Morning Rotary Present on RCI	20
1.28 Goshen Chamber Key Leader RCI presentation	20
12.17 RCI present. to coalition of northern Indiana state legislators	15
11.21 RCI Forum with IEDC Intro of Study	200
11.13, Goshen Chamber Board Retreat - RCI presentation	30
11.12 Horizon 3.0 Planning Mtg, Elkhart	10
11.12 MACOG, presentation on RCI	30



### A-3 Key Leadership Interviews

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## A-4 Project Consulting Team

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### A-5-a Elected Officials Engagement: Represented by MACOG Board Members from RDA Region

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Oliver Davis  
Councilman, City of South Bend Common  
Council  
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South Bend, IN 46601

Deborah Fleming  
Commissioner, St. Joseph County  
Commissioners  
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Allan Kauffman  
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John Letherman  
Councilman, Elkhart County Council  
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117 N. Second St.  
Goshen, IN 46526

Frank Lucchese  
Commissioner, Elkhart County Commissioners  
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Goshen, IN 46526

Dick Moore  
Mayor, City of Elkhart  
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Elkhart, IN 46516

Kevin Overmyer  
Commissioner, Marshall County  
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John Reisdorf  
Councilman, Mishawaka Common Council  
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Mishawaka, IN 46544

Mark Root  
Councilman, St. Joseph County Council  
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South Bend, IN 46601

Mark Senter  
Mayor, City of Plymouth  
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Judy Stone  
Councilman, Marshall County Council  
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Plymouth, IN 46563

Larry Thompson  
Mayor, City of Nappanee  
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Nappanee, IN 46550

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Dave Wood  
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South Bend | Mishawaka | Elkhart | Goshen  
Nappanee | Plymouth | Warsaw  
574.400.5432 | MichianaRegion.com  
Remberton@MichianaRegion.com

November 20, 2014

Eric R. Doden, President, IEDC  
One North Capitol, Suite 700  
Indianapolis, IN 46204

Eric,

This letter is written to express our collective interest in the Regional Cities Initiative announced by Governor Pence and the IEDC. As Mayors and Commissioners of the cities and counties in north central Indiana, we recognize our key assets, strengths and opportunities and we share your vision of becoming a best-in-class place to live and work. We believe in a future that transforms this area into a vibrant hub that is attractive to the needs of future generations.


Our region is working together to submit an application to partner with the State on this Regional Cities Initiative and will coordinate efforts through Michiana Partnership, Inc. We invite our local public and private sector leaders to collaborate with us, and Michiana Partnership as our single point of contact, as we align. We look forward to working together on this initiative and are confident that the leaders across our region are well positioned to define transformational projects that will increase economic opportunity in the region and across the state. Please don't hesitate to contact Michiana Partnership, or any of us, with questions or for additional information throughout the process.


We look forward to learning more about this opportunity and working together to exponentially increase the visibility of the region as a great place to live and work; as well as contributing to a state-wide increase in population from 6.4 million to approximately 9 million over the next decade!


  
**CITY OF SOUTH BEND**  
Mayor Peter Buttigieg

  
**CITY OF MISHAWAKA**  
Mayor Dave Wood

  
**CITY OF ELKHART**  
Mayor Dick Moore

  
**CITY OF GOSHEN**  
Mayor Allan Kauffman

  
**CITY OF NAPPANEE**  
Mayor Larry Thompson

  
**CITY OF PLYMOUTH**  
Mayor Mark Senter

  
**ELKHART COUNTY**  
Mike Yoder  
Commissioner

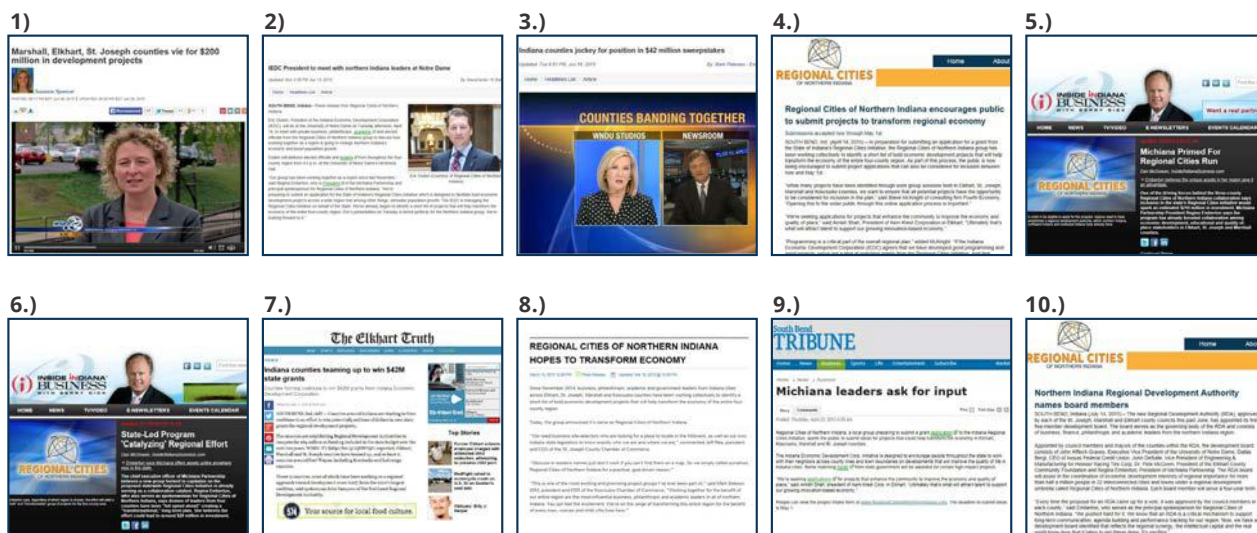
  
**ST. JOSEPH COUNTY**  
Andy Kostielney  
Commissioner

  
**MARSHALL COUNTY**  
Kevin Overmyer  
Commissioner



## REGIONAL CITIES OF NORTHERN INDIANA MEDIA ENGAGEMENT & COMMUNICATIONS

- 1.) Marshall, Elkhart, St. Joseph counties vie \$200 million in development projects:  
<http://www.wsbt.com/news/local/marshall-elkhart-st-joseph-counties-vie-for-200-million-in-development-projects/33469670>
- 2.) IEDC President to meet with Northern Indiana leaders at Notre Dame:  
<http://www.wndu.com/home/headlines/IEDC-President-to-meet-with-Northern-Indiana-leaders-at-Notre-Dame-299600901.html>
- 3.) Indiana Counties jockey for position in \$42 Million sweepstakes:  
<http://www.wndu.com/home/headlines/Indiana-counties-jockey-for-position-in-42-million-sweepstakes-307697521.html>
- 4.) Regional Cities of Northern Indiana encourages public to submit projects to transform regional economy:  
[http://regionalcitiesofnorthernindiana.org/newrelease\\_041415.html](http://regionalcitiesofnorthernindiana.org/newrelease_041415.html)
- 5.) Michiana primed for Regional Cities Run:  
<http://www.insideindianabusiness.com/story/29600617/michiana-primed-for-regional-cities-run>
- 6.) State-led program Catalyzing regional Effort:  
<http://www.insideindianabusiness.com/story/29823601/state-led-program-catalyzing-regional-effort>
- 7.) Indiana counties teaming up to win \$42m state grants:  
<http://www.elkharttruth.com/news/indiana/2015/06/17/indiana-counties-teaming-up-to-win-42m-state-grants.html>
- 8.) Regional Cities of Northern Indiana Hopes to Transform Economy:  
<http://www.inkfreeeews.com/2015/03/10/regional-cities-of-northern-indiana-hopes-to-transform-economy/>
- 9.) Michiana Leaders ask for input:  
[http://www.southbendtribune.com/news/business/michiana-leaders-ask-for-input/article\\_c9c9068-e99d-11e4-8578-5351c9c74f0b.html](http://www.southbendtribune.com/news/business/michiana-leaders-ask-for-input/article_c9c9068-e99d-11e4-8578-5351c9c74f0b.html)
- 10.) Northern Indiana Regional Development Authority names board members:  
[http://regionalcitiesofnorthernindiana.org/newrelease\\_071415.html](http://regionalcitiesofnorthernindiana.org/newrelease_071415.html)





## JOHN AFFLECK-GRAVES, UNIVERSITY OF NOTRE DAME



### JOHN AFFLECK-GRAVES

Executive Vice President  
University of Notre Dame

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John Affleck-Graves was elected executive vice president April 30, 2004, by the Board of Trustees. He holds the Notre Dame Chair in Finance and previously served for three years as vice president and associate provost.

Dr. Affleck-Graves' responsibilities include administration of an annual operating budget of more than \$900 million and an endowment of more than \$5 billion. He also oversees human resource activities for a work force of more than 4,000 employees – the largest in St. Joseph County – and directs the University's construction program.

Dr. Affleck-Graves served on the Notre Dame faculty from 1986-2000 – the final three years as chairman of the Department of Finance and Business Economics – and returned in 2001 after a year at Florida State University as the Patty Hill Smith Eminent Scholar in Finance. He previously taught from 1975-86 at his alma mater, the University of Cape Town, where he earned bachelor's, master's and doctoral degrees.

The author of more than 50 refereed publications, Dr. Affleck-Graves specializes in the study of initial public offerings, valuation and asset pricing models, and shareholder value added methodology. He has served as a consultant for numerous companies, including Allied Signal, Bayer, Merck, Pharmacia & Upjohn, and Donnelly Glass.

Highly regarded in the classroom as well, Dr. Affleck-Graves has received six outstanding teaching awards at Notre Dame – three in the regular MBA Program, two in the Executive MBA Program and one for undergraduate teaching – and two others at Cape Town.

While previously at Notre Dame, he was actively involved in University governance, serving on the Academic Council, the Academic Code of Honor Committee, the Faculty Senate, and as chair of the Provost's Task Force on Curricular Innovation.

He is a native of South Africa who is now a U.S. citizen.





## OATH OF OFFICE

STATE OF INDIANA )  
 ) SS  
St. Joseph COUNTY )

I, John Affleck-Graves, do hereby solemnly swear that I will support the Constitution of the United States and the Constitution of the State of Indiana and to the best of my ability I will faithfully and impartially discharge the duties and accept the responsibilities of a member of the Regional Cities of Northern Indiana Regional Development Authority Board, and that I will observe and obey all the laws relating to said office now in force or which may hereafter be enacted during my term of service.

(signature of appointee)

Subscribed and sworn to before me this 28<sup>th</sup> day of July, 2015 .  
 My commission expires

March 10, 2016

St. Joseph County

IC 36-7.6-2-9(d) states "Each member appointed to a development board, before entering upon the duties of office, must take and subscribe an oath of office under IC 5-4-1, which shall be endorsed upon the certificate of appointment and filed with the records of the development board."





## REGINA EMBERTON, MICHIANA PARTNERSHIP



### **REGINA EMBERTON, CCIM, SIOR**

President & CEO  
Michiana Partnership

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Regina Emberton, CCIM, SIOR joined the Michiana Partnership, Inc. as its first President & CEO in 2013. The Michiana Partnership is a collaboration of economic development partners in North Central Indiana that seeks to create economic opportunity for all partners through collaborative promotion, marketing and sales efforts.

Regina leads the Partnership's effort to market the advantages of the Michiana region in order to attract new jobs and investment by leveraging the individual strengths, competitive advantages, knowledge and resources of the region.

Prior to joining Michiana Partnership, Regina served as Vice President, Brokerage Services for CBRE | Bradley, where she was engaged in a variety of commercial real estate projects, including market research, consulting, brokerage, investment, and development. Prior to the fourteen years with CBRE | Bradley, Regina was employed with the City of Mishawaka Community & Economic Development, the City of South Bend Community and Economic Development, and Center City Associates (predecessor to Downtown South Bend, Inc.).

Regina's civic leadership service currently includes working with the Boys & Girls Club, downtown organizations, the St. Joe Valley Metronet, and her daughters' schools. She had previously been involved as a board member for a local public transportation system, United Way and Junior Achievement of Michiana.





## OATH OF OFFICE

STATE OF INDIANA )  
 ) SS  
St. Joseph COUNTY )

I, Regina Emberton, do hereby solemnly swear that I will support the Constitution of the United States and the Constitution of the State of Indiana and to the best of my ability I will faithfully and impartially discharge the duties and accept the responsibilities of a member of the Regional Cities of Northern Indiana Regional Development Authority Board, and that I will observe and obey all the laws relating to said office now in force or which may hereafter be enacted during my term of service.

Regina L. Emberton.  
 (signature of appointee)

Subscribed and sworn to before me this 28<sup>th</sup> day of July, 2015 .  
 My commission expires

March 10, 2016

Stephen A. Studer

IC 36-7.6-2-9(d) states "Each member appointed to a development board, before entering upon the duties of office, must take and subscribe an oath of office under IC 5-4-1, which shall be endorsed upon the certificate of appointment and filed with the records of the development board."





## DALLAS BERGL, INOVA FEDERAL CREDIT UNION



### DALLAS BERGL

President & CEO  
INOVA Federal Credit Union

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[www.inovafcu.org](http://www.inovafcu.org)

Dallas Bergl has worked in the credit union industry for over 25 years, holding positions from Collections Manager to CEO. Currently he is the President and Chief Executive Officer of INOVA FCU; a position he has held since 1999. INOVA FCU is the largest Federally Insured financial institution Headquartered in Elkhart County.

He serves as a member of the Lerner Theatre Governing Board, the SOMA sub-committee for downtown revitalization, the IUSB Arts Foundation Board, the Indiana Credit Union League (ICUL) Board, The Credit Union National Association Board, the Credit Union Centers Board, CUNA's World Leadership Development Committee, and chairs ICUL's Governmental Affairs Committee. He has also served on NAFCU's Governmental Affairs Committee, the Lerner Theatres fundraising committee, Elkhart's 400 block study group, Downtown Elkhart Inc.'s Board of Directors and many other boards and committees over his career.

While in the United States Army's Infantry, he served in President Ronald Reagan's Presidential Escort where he received numerous honors, awards and citations. In his professional and public service he has been awarded the Key to the City of Elkhart, Professional of the Year from the ICUL, the Paul Revere Award and others.

He was educated at the University of Maryland, in Business and Administration (BS).

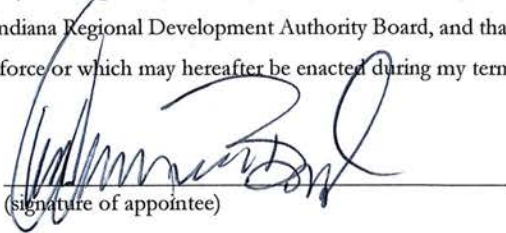




## OATH OF OFFICE

STATE OF INDIANA )  
 ) SS  
St. COUNTY )

I, Dallas Bergl, do hereby solemnly swear that I will support the Constitution of the United States and the Constitution of the State of Indiana and to the best of my ability I will faithfully and impartially discharge the duties and accept the responsibilities of a member of the Regional Cities of Northern Indiana Regional Development Authority Board, and that I will observe and obey all the laws relating to said office now in force or which may hereafter be enacted during my term of service.

  
 (signature of appointee)

Subscribed and sworn to before me this 28<sup>th</sup> day of July, 2015 .  
 My commission expires

March 10, 2016

St. Joseph County

IC 36-7.6-2-9(d) states "Each member appointed to a development board, before entering upon the duties of office, must take and subscribe an oath of office under IC 5-4-1, which shall be endorsed upon the certificate of appointment and filed with the records of the development board."





## JOHN DeSALLE, HOOSIER RACING TIRE CORP (HRC)



### JOHN DeSALLE

Vice President  
Hoosier Racing Tire Corp  
(HRC)

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Lakeville, IN 46536

[www.HoosierTire.com](http://www.HoosierTire.com)

Mr. DeSalle has over 30 years of experience in the tire industry with nearly 27 years of experience in various engineering and manufacturing responsibilities at Hoosier Racing Tire Corp (HRT). John earned his BSME at Kettering University and MBA from Indiana University. John worked at Cooper Tire as a Research Engineer and as a Tire Engineer in passenger tire product development and then began a career at HRT in 1989.

In 2009, he was named VP Engineering, primarily responsible for all Engineering functions along with corporate management responsibilities. In 2010, Promoted to VP Engineering and Manufacturing, John's responsibilities grew to include managing and directing Plant Engineering, Production Management, Safety Director and Training Coordinator for the entire corporation. As a senior member of management reporting directly to the CEO and Board of Directors of HRT, John is deeply involved in all of the companies' insurance products and is responsible for the production facility located in Plymouth, IN, a vertically integrated Mixing and Tire Production facility in excess of 450,000 sq. ft. that is entirely devoted to small batch manufacturing of race tire products.

The production facility produces in excess of 1,400 unique race tire products, at any specific time as many as 40 different SKU's are being produced.





## OATH OF OFFICE

STATE OF INDIANA )  
 ) SS  
St. Joseph COUNTY )

I, John DeSalle, do hereby solemnly swear that I will support the Constitution of the United States and the Constitution of the State of Indiana and to the best of my ability I will faithfully and impartially discharge the duties and accept the responsibilities of a member of the Regional Cities of Northern Indiana Regional Development Authority Board, and that I will observe and obey all the laws relating to said office now in force or which may hereafter be enacted during my term of service.

John C. DeSalle  
 (signature of appointee)

Subscribed and sworn to before me this 28<sup>th</sup> day of July, 2015 .  
 My commission expires

March 10, 2016

Stephen A. Studer

IC 36-7.6-2-9(d) states "Each member appointed to a development board, before entering upon the duties of office, must take and subscribe an oath of office under IC 5-4-1, which shall be endorsed upon the certificate of appointment and filed with the records of the development board."





## PETE McCOWN, ELKHART COUNTY COMMUNITY FOUNDATION



### PETE McCOWN

President  
The Community  
Foundation of Elkhart  
County

574.295.8761

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[www.elkhartccf.org](http://www.elkhartccf.org)

Dr. Pete McCown serves as the President of The Community Foundation of Elkhart County; a role he has held since 2011.

Prior to assuming the Presidency of the Community Foundation, McCown served as a Professor of Business and Vice President for Advancement at Bethel College.

McCown holds graduate degrees (Masters in Education and Ph.D. in Organization, Administration and Policy) from the State University of New York. He also holds a Masters in Business Administration from Indiana Wesleyan University.

Pete and his wife, Wendy, have been married 24 years and are the parents of four teenage sons ages 18-14 and a daughter, age 13.

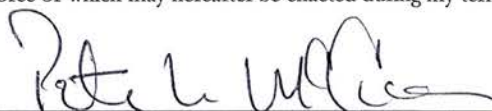




## OATH OF OFFICE

STATE OF INDIANA )  
 ) SS  
St. Joseph COUNTY )

I, Pete McCown, do hereby solemnly swear that I will support the Constitution of the United States and the Constitution of the State of Indiana and to the best of my ability I will faithfully and impartially discharge the duties and accept the responsibilities of a member of the Regional Cities of Northern Indiana Regional Development Authority Board, and that I will observe and obey all the laws relating to said office now in force or which may hereafter be enacted during my term of service.

  
 (signature of appointee)

Subscribed and sworn to before me this 28<sup>th</sup> day of July, 2015 .  
 My commission expires

March 10, 2016



IC 36-7.6-2-9(d) states "Each member appointed to a development board, before entering upon the duties of office, must take and subscribe an oath of office under IC 5-4-1, which shall be endorsed upon the certificate of appointment and filed with the records of the development board."





CONFORMED COPY

## NORTHERN INDIANA REGIONAL DEVELOPMENT AUTHORITY

### BYLAWS

#### Article I

##### General

1. Name. The name of this organization, as a separate body corporate and politic of the State of Indiana, established pursuant to IC 36-7.6 et seq. (the “Act”), is the “Northern Indiana Regional Development Authority (the “Authority”).
2. Purpose. The purpose for which the Authority is formed is (a) to acquire, construct, equip, own, lease, and finance projects and facilities for lease to or for the benefit of eligible political subdivisions and (b) to fund and develop airport authority projects, commuter transportation district and other rail projects, regional transportation authority projects and services, economic development projects, intermodal transportation projects, regional trail or greenway projects, and any project that enhances the region with the goal of attracting people or business, that are of regional importance.
3. Duties. The Authority shall assist in the coordination of local efforts concerning projects that are of regional importance; assist a county, a municipality, a commuter transportation district, an airport authority, and a regional transportation authority in coordinating regional transportation and economic development efforts; and fund projects that are of regional importance.
4. Powers. The Authority has the powers granted to it under the Act, effective July 1, 2015, as may be amended by the Indiana General Assembly. The Authority may do the following:



- (a) Finance, improve, construct, reconstruct, renovate, purchase, lease, acquire, and equip land and projects that are of regional importance.
- (b) Lease land or a project to an eligible political subdivision.
- (c) Finance and construct additional improvements to projects or other capital improvements owned by the development authority and lease them to or for the benefit of an eligible political subdivision.
- (d) Construct or reconstruct highways, roads, and bridges.
- (e) Acquire land or all or a part of one (1) or more projects from an eligible political subdivision by purchase or lease and lease the land or projects back to the eligible political subdivision, with any additional improvements that may be made to the land or projects.
- (f) Acquire all or a part of one (1) or more projects from an eligible political subdivision by purchase or lease to fund or refund indebtedness incurred on account of the projects to enable the eligible political subdivision to make a savings in debt service obligations or lease rental obligations or to obtain relief from covenants that the eligible political subdivision considers to be unduly burdensome.
- (g) Make loans, loan guarantees, and grants or provide other financial assistance to or on behalf of the following:
  - (i) A commuter transportation district.
  - (ii) An airport authority.
  - (iii) A regional transportation authority. A loan, a loan guarantee, a grant, or other financial assistance under this clause may be used by a regional transportation authority for acquiring, improving, operating, maintaining, financing, and acquiring, improving, operating, maintaining, financing, and supporting the following: (1) Bus services (including fixed route services and flexible or demand-responsive services) that are a component of a public transportation system. (2) Bus terminals, stations, or facilities or other regional bus authority projects.
  - (iv) A county.
  - (v) A municipality.
- (h) Provide funding to assist a railroad that is providing commuter transportation services in a county containing territory included in the development authority.
- (i) Provide funding to assist an airport authority located in a county containing territory included in the development authority in the construction, reconstruction, renovation, purchase, lease, acquisition, and equipping of an airport facility or airport project.



- (j) Provide funding for intermodal transportation projects and facilities.
- (k) Provide funding for regional trails and greenways.
- (l) Provide funding for economic development projects.
- (m) Hold, use, lease, rent, purchase, acquire, and dispose of by purchase, exchange, gift, bequest, grant, condemnation, lease, or sublease, on the terms and conditions determined by the development authority, any real or personal property.
- (n) After giving notice, enter upon any lots or lands for the purpose of surveying or examining them to determine the location of a project.
- (o) Make or enter into all contracts and agreements necessary or incidental to the performance of the development authority's duties and the execution of the development authority's powers under the Act.
- (p) Sue, be sued, plead, and be impleaded.
- (q) Design, order, contract for, construct, reconstruct, and renovate a project or improvements to a project.
- (r) Appoint an executive director and employ appraisers, real estate experts, engineers, architects, surveyors, attorneys, accountants, auditors, clerks, construction managers, and any consultants or employees that are necessary or desired by the development authority in exercising its powers or carrying out its duties under the Act.
- (s) Accept loans, grants, and other forms of financial assistance from the federal government, the state government, a political subdivision, or any other public or private source.
- (t) Use the development authority's funds to match federal grants or make loans, loan guarantees, or grants to carry out the development authority's powers and duties under the Act.
- (u) Except as prohibited by law, take any action necessary to carry out the Act.
- (v) Exercise condemnation power under IC 32-24-1.

### **Article II**

#### **Board**

1. **Members.** The Authority Board (the “Board”) is governed by five (5) members (“Members”) appointed by written agreement among the executives of the units of government



participating in the RDA (the “executives”).

2. Term. Each member serves a four (4) year term and may be reappointed to subsequent 4 year terms. Removal of a member prior to expiration of the four year term requires written agreement by at least 3/4 of the executives. Should a vacancy occur, the executives shall fill a vacancy to serve the remainder of the vacant term.

3. Oath. Each member is required to take and subscribe an oath of office under IC 5-4-1.

4. Compensation. Members shall not receive compensation but may be entitled to a per diem for the member’s participation in Board meetings. The amount of the per diem is limited to the amount authorized under IC 4-10-11-2.1(b).

### Article III

#### **Meetings of the Board**

1. Annual Meeting. In January of each year, the Board shall hold an organizational meeting to elect a Chair, Vice-Chair and Secretary-Treasurer as described in Article V.

2. Regular Meetings. The Board shall meet at least quarterly at a place designated by the Board. Notices of all regular meetings shall be given, and meetings shall be held, in accordance with Indiana’s Open Door Law (IC 5-14-1.5).

3. Special Meetings. Special meetings of the Board may be called by the Chair of the Board or any two (2) members of the Board.

### Article IV

#### **Procedures at Meetings**

1. Voting. Affirmative votes of a majority of the Board are necessary to authorize any action of the Authority.



2. Quorum. The presence of a majority of the Board shall be necessary to constitute a quorum for the transaction of business at any meeting.
3. Order of Business. The regular order of business at all meetings of the Board shall be as follows:
  - a. Roll call;
  - b. Report of Secretary on giving notice of meeting;
  - c. Approval of minutes of preceding meeting;
  - d. Reports of officers, consultants and staff;
  - e. Reports of Committees;
  - f. Old business; and
  - g. New business.
4. Consent Agendas. Any item of business before the Board may be placed on a consent agenda to be voted upon as a group unless otherwise required by statute, regulation or rule.
5. Action at Regular and Special Meetings. At all regular and special meetings of the Board, it shall be valid for the Board to act on any subject within the power of the Board.

### Article V

#### **Officers of the Board**

1. Officers. The officers of the Board shall be Chair, Vice Chair(s), and Secretary-Treasurer.
2. Terms of Office. All officers of the Board shall be elected annually by the Board of Trustees and each shall hold office for a term of one (1) year or until their successors are duly elected.



3. Duties of Officers. The duties and powers of the officers of the Board shall be as follows:

a. Chair. The Chair shall preside at all meetings of the Board and shall cause to be called regular and special meetings of the Board in accordance with these Bylaws. The Chair shall sign and make all contracts and agreements in the name of the Authority, subject to the approval of the Board, and shall enforce these Bylaws and perform all of the duties incident to the position and office and which are required by law.

b. Vice Chair. Each Vice Chair shall have such powers and perform such duties as the Board or the Chair may, from time to time, assign or delegate.

c. Secretary-Treasurer. The Secretary/Treasurer shall keep correct and complete books of account and minutes of the proceedings of the Authority. The Secretary/Treasurer shall attend to the giving and serving of all notices required herein and by State law. The Secretary/Treasurer shall have the custody of all funds and securities of the Corporation and shall keep a complete and accurate account thereof and of all moneys received and paid out by the Secretary/Treasurer. It shall be his or her duty to furnish to the Board at their regular annual meeting or at any special meeting, upon receipt by the Board, complete and accurate account of the receipts and expenditures of the Authority for the preceding year or for such period as the board may require, together with a statement of financial condition of the Authority at the time of such report.



### Article VI

#### **Staff of the Authority**

1. Executive Director. The Board may appoint an Executive Director of the Authority. The Executive Director shall be selected by the Board by the affirmative vote of a majority of the members of the Board provided 2/3 of the members are present at the meeting at which action is taken.

The Executive Director shall be the chief executive officer of the Authority and subject to control of the Board. The Executive Director shall manage, direct, and be responsible for the conduct of all affairs of the Authority, except those which by law or these Bylaws are made the specific responsibility of the Board, the Chair of the Board, or another officer of the Board. The Executive Director shall attend all meetings of the Board, Committee Meetings and shall report upon the affairs of the Board.

2. Other Staff. All other staff of the Authority shall be recommended to the Board by the Executive Director, if one has been elected, subject to the rules and policies as may from time to time be established by the Board.

3. Consultants. The Board may appoint and retain by affirmative vote of the majority of the Board, such consultants and advisors as the Board determines to be in the best interests of the Authority.

4. Other Officers of the Authority. The Board may appoint such other officers of the Authority as it desires and may prescribe their responsibilities and duties.

### Article VII

#### **Funds**

1. Development Fund. The Authority shall establish and administer a development



authority fund (the “Fund”) in accordance with IC 36-7.6-4-1. The fund shall consist of the following:

- a. Amounts transferred to the fund by units of government participating in the establishment of the Authority.
- b. Amounts transferred to the fund as required under any interlocal agreements.
- c. Appropriations, grants, or other distributions made to the fund by the state.
- d. Money received from the federal government.
- e. Gifts, contributions, donations, and private grants made to the fund.

2. Use of the Fund. Monies in the fund shall be used to carry out the duties, powers, and purpose of the Authority and shall not revert to any other fund.

3. Procurement. Use of the funds shall comply with Indiana’s Public Purchasing statute (IC 5-22), Public Works statute (IC 36-1-12), and all applicable federal bidding statutes and regulations.

4. Contract Authorization and Execution of Documents. Except as otherwise expressly authorized by resolution of the Board, all contracts and other written instruments of any kind which are necessary to carry out the Authority’s powers under the Act must be specifically approved and authorized by the Board.

### **Article VIII**

#### **Rules and Regulations**

The Board may cause to be prescribed and promulgated rules and regulations concerning the conduct and coordination of programs and services to carry out its purpose under IC 36-7.6.



### Article IX

#### **Amendments**

These Bylaws may be altered, amended, repealed or added to by an affirmative vote of a majority of the Board at any regularly called or specially called meeting.

SIGNED AND APPROVED this 18<sup>th</sup> day of August, 2015.

By /s/ John Affleck-Graves

By /s/ John DeSalle

By /s/ Pete McCown

By /s/ Dallas Bergl

By /s/ Regina Emberton



### Contract for Services

#### I.

##### Recitals

This Contract for Services is made this 18th day of August, 2015, by and between the Northern Indiana Regional Development Authority, hereinafter called “RDA”, and the Michiana Area Council of Governments, hereinafter called “MACOG”, for the purposes of establishing the scope and extent of services to be performed by MACOG on behalf of the RDA, the conditions of those services, and the payment to be rendered to MACOG in exchange for the rendering of those services.

#### II.

##### Contract

The RDA and MACOG hereby agree and contract that MACOG shall perform administrative, business, office support, and other services, for the RDA, to aid the RDA in the discharge of the RDA’s duties, obligations, mission, and whatsoever acts or undertakings the RDA shall determine to be useful, beneficial, or otherwise desirable, subject always to the enabling legislation creating the RDA and any and all other applicable federal statutes, regulations, and laws, and any and all other state statutes, regulations, and laws, and subject always to the direction and control of the RDA and its members; these services shall include, but not be limited to, the following:

**1. Office Facilities, Staff and Supplies.** MACOG shall provide staff assistance and support, as may be required by the RDA and mutually agreed to by MACOG, as well as office space, office supplies, reception services, and associated and incidental services and facilities;

**2. Budget Preparation.** MACOG shall aid the RDA in the preparation of the RDA’s budget, and provide accounting services for the receipt, investment and dispersal of RDA funds, in accordance with applicable State Board of Accounts guidelines, and all other applicable statutes, regulations and guidelines;

**3. Collections and Deposit of Funds.** MACOG shall collect, hold, deposit, and account for, RDA funds in the name of, and on behalf of, the RDA in depositories designated by the RDA;

**4. Management of Funds.** MACOG shall manage RDA funds as appropriate, including, but not limited to, depositing those funds in various accounts and purchasing certificates of deposit. MACOG shall keep clear and complete records of the use and location of RDA funds, which records shall be available for inspection by the RDA, any of its members or legal representatives, upon demand;

**5. Disbursal of Funds.** MACOG shall disburse RDA funds only when authorized to do so by the RDA and presented with a State Board of Accounts standard claim form signed and approved by a duly authorized RDA member. Checks will be drawn from an account in the RDA’s name and shall be signed by two (2) authorized persons designated by the RDA to perform this function;

**6. Graphic, Printing, and Clerical Services.** MACOG shall provide printing and graphic services, telephone services, and computer network services as well as incidental and associated materials as needed;

**7. Records of Billings and Expenses.** MACOG shall maintain records of all charges made to the RDA, and shall make those records available to the RDA, or any member or legal representative of the RDA, upon request;

**8. Billing for Services.** MACOG will provide the RDA services through MACOG’s typical programs until a budget is established by the RDA. MACOG shall bill the RDA every month, by itemized



bill, for all services rendered by MACOG, and for all costs, materials, advances, and expenses incurred by MACOG on behalf of the RDA, or in furtherance of RDA business, and for all other items whatsoever, chargeable to the RDA in that month;

**9. Payment for Services.** The RDA shall pay in full all itemized bills or other itemized charges submitted by MACOG, within thirty (30) days of receipt of that itemized bill or other itemized charge, except as provided in paragraph 10;

**10. Dispute or Waiver.** In the event that there shall be any dispute as to any bill, the RDA shall be required to state such dispute, discrepancy, or question, in writing within thirty (30) days of the RDA's receipt of the bill or other contested charge. Upon submission of the written statement of the billing dispute, the RDA's duty to pay the disputed item or items shall be suspended and tolled until resolution of the dispute. In the event that such a dispute, discrepancy, or question arises, the RDA shall nonetheless be required to pay in full, within thirty (30) days of receipt of the bill or other charge, all uncontested portions of the bill or other charges, and may withhold payment only of the disputed portion, as stated in writing, of the bill or charge. Failure by the RDA to file a written statement of dispute, discrepancy, or question, within thirty (30) days of receipt of the itemized bill or other itemized charge, shall constitute a waiver of any such dispute, discrepancy, or other question, and the RDA shall thereafter be estopped from contesting such bill or other charge;

**11. Duration.** The terms of this Contract shall be in effect for two (2) years, terminating on June 30, 2017 with an option for renewal at the end of that 2-year period, subject, however, to the right of either party to terminate this Contract at any earlier time by providing written notice to terminate at least sixty (60) days prior to the effective termination date, which effective termination date must coincide with the last day of a calendar month.

**Michiana Area Council of Governments, by**

**Northern Indiana RDA, by**

\_\_\_\_\_  
Larry Thompson, Chairman

\_\_\_\_\_, President

**Attested to by:**

**Attested to by:**

\_\_\_\_\_  
James Turnwald, Executive Director

\_\_\_\_\_, Vice-President

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**COUNTY COUNCIL OF THE COUNTY OF ELKHART**  
**ORDINANCE DATED JUNE 13, 2015**  
**ORDINANCE # CC-2015-11**

**RECEIVED**  
**JUL 3-0 2015**

BY: \_\_\_\_\_

**AN ORDINANCE AUTHORIZING ELKHART COUNTY, INDIANA  
 TO PARTICIPATE IN THE ESTABLISHMENT OF A  
 REGIONAL DEVELOPMENT AUTHORITY**

WHEREAS, the Indiana Regional Cities Initiative was signed into law on May 7, 2015 creating the Indiana Regional City Fund (the "Fund") to be administered by the Indiana Economic Development Corporation (the "IEDC") for the purpose of providing grants and loans to Regional Development Authorities for projects; and

WHEREAS, pursuant to I.C. 36-7.6 *et seq.* (the "Act"), one (1) or more counties and one (1) or more adjacent counties may participate in the establishment of a Regional Development Authority (the "Development Authority") as a separate body corporate and politic to carry out the purposes of the Act; and

WHEREAS, the Act authorizes a Development Authority to fund and develop airport authority projects, transportation projects, economic development projects, and any project that enhances the region with the goal of attracting people or business, that are of regional importance; and

WHEREAS, the Act requires that a Development Authority submit a Comprehensive Strategic Development Plan (the "Plan") to the IEDC for consideration of Fund monies; and

WHEREAS, the Counties of Elkhart, Marshall, and St. Joseph (collectively, the "Members") believe they could benefit from establishing a Development Authority; and

WHEREAS, when the Members establish a Development Authority, each second class and third class city in the county will automatically become a member of the Development Authority; and

WHEREAS, Elkhart County (the "County") finds that it is necessary to participate in the Development Authority for the purposes granted to it under the Act, including applying for Fund monies;

NOW, THEREFORE, BE IT ORDAINED BY THE ELKHART COUNTY COUNCIL THAT:

1. The Elkhart County Council finds and determines that it is in the best interest of Elkhart County to authorize the County's participation in the Development Authority as a separate body corporate and politic for the purposes and with all the powers and duties granted to it under the Act.



2. The Elkhart County Council hereby authorizes Elkhart County's participation in the Development Authority.

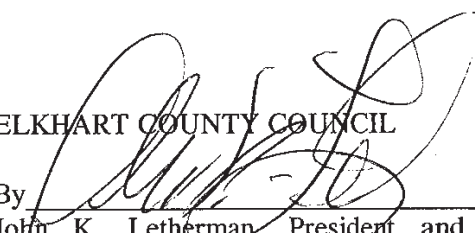
3. The County's membership period will expire eight (8) years from the date of the passage of this Ordinance.

4. Pursuant to the Act, the Development Authority shall be governed by five (5) individuals appointed by the executives of the Members of the Development Authority who meet the criteria as defined under the Act.

5. This Ordinance shall be in full force and effect from and after its passage.

Adopted this 13<sup>th</sup> day of June, 2015.

### ELKHART COUNTY COUNCIL

By   
John K. Letherman, President and Presiding Officer

By   
David E. Foutz

By   
Randall Yohn

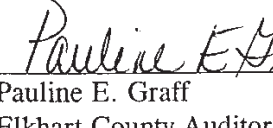
By   
David L. Hess

By   
Darryl J. Riegsecker

By   
Thomas Stump

By   
David M. Ashe

ATTEST:

  
Pauline E. Graff  
Elkhart County Auditor



### COUNTY COUNCIL OF THE COUNTY OF MARSHALL ORDINANCE DATED JUNE 8, 2015 ORDINANCE # 2015-08

#### AN ORDINANCE AUTHORIZING MARSHALL COUNTY, INDIANA TO PARTICIPATE IN THE ESTABLISHMENT OF A REGIONAL DEVELOPMENT AUTHORITY

WHEREAS, the Indiana Regional Cities Initiative was signed into law on May 7, 2015 creating the Indiana Regional City Fund (the “Fund”) to be administered by the Indiana Economic Development Corporation (the “IEDC”) for the purpose of providing grants and loans to Regional Development Authorities for projects; and

WHEREAS, pursuant to IC 36-7.6 *et seq.* (the “Act”), one (1) or more counties and one (1) or more adjacent counties may participate in the establishment of a Regional Development Authority (the “Development Authority”) as a separate body corporate and politic to carry out the purposes of the Act; and

WHEREAS, the Act authorizes a Development Authority to fund and develop airport authority projects, transportation projects, economic development projects, and any project that enhances the region with the goal of attracting people or business, that are of regional importance; and

WHEREAS, the Act requires that a Development Authority submit a Comprehensive Strategic Development Plan (the “Plan”) to the IEDC for consideration of Fund monies; and

WHEREAS, the Counties of Elkhart, Marshall and St. Joseph (collectively, the “Members”) believe they could benefit from establishing a Development Authority; and

WHEREAS, when the Members establish a Development Authority, each second class and third class city in the county will automatically become a member of the Development Authority; and

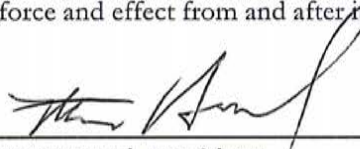
WHEREAS, Marshall County (the “County”) finds that it is necessary to participate in the Development Authority for the purposes granted to it under the Act, including applying for Fund monies;

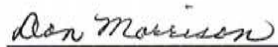


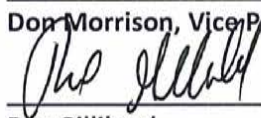
**NOW, THEREFORE, BE IT ORDAINED BY THE MARSHALL COUNTY COUNCIL THAT:**

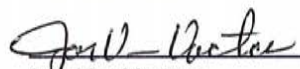
1. The Marshall County Council finds and determines that it is in the best interest of Marshall County to authorize the County's participation in the Development Authority as a separate body corporate and politic for the purposes and with all the powers and duties granted to it under the Act.
2. The Marshall County Council hereby authorizes Marshall County's participation in the Development Authority.
3. The County's membership period will expire eight (8) years from the date Marshall County becomes a member of the Development Authority, as authorized in this Ordinance.
4. Pursuant to the Act, the Development Authority shall be governed by five (5) individuals appointed by the executives of the Members of the Development Authority who meet the criteria as defined under the Act.
5. This Ordinance shall be in full force and effect from and after its passage.

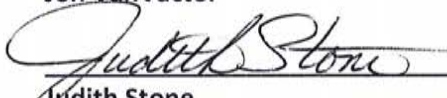
Adopted this 8th day of June, 2015.

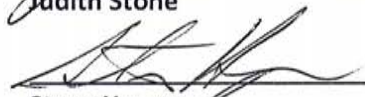
  
Matt Hassel, President

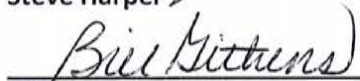
  
Don Morrison, Vice President

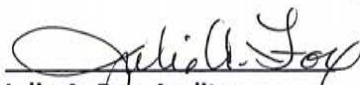
  
Rex Gilliland

  
Jon VanVactor

  
Judith Stone

  
Steve Harper

  
Bill Githens

Attest:   
Julie A. Fox, Auditor



BILL NO. 39-15

COUNTY COUNCIL OF THE COUNTY OF \_\_\_\_\_  
 ORDINANCE DATED \_\_\_\_\_, 2015  
 ORDINANCE # 27-15

St. Joseph  
 AN ORDINANCE AUTHORIZING \_\_\_\_\_ COUNTY, INDIANA  
 TO PARTICIPATE IN THE ESTABLISHMENT OF  
 A REGIONAL DEVELOPMENT AUTHORITY

WHEREAS, the Indiana Regional Cities Initiative was signed into law on May 7, 2015 creating the Indiana Regional City Fund (the "Fund") to be administered by the Indiana Economic Development Corporation (the "IEDC") for the purpose of providing grants and loans to Regional Development Authorities for projects; and

WHEREAS, pursuant to IC 36-7.6 *et seq.* (the "Act"), one (1) or more counties and one (1) or more adjacent counties may participate in the establishment of a Regional Development Authority (the "Development Authority") as a separate body corporate and politic to carry out the purposes of the Act; and

WHEREAS, the Act authorizes a Development Authority to fund and develop airport authority projects, transportation projects, economic development projects, and any project that enhances the region with the goal of attracting people or business, that are of regional importance; and

WHEREAS, the Act requires that a Development Authority submit a Comprehensive Strategic Development Plan (the "Plan") to the IEDC for consideration of Fund monies; and

WHEREAS, the Counties of Elkhart, Marshall and St. Joseph (collectively, the "Members") believe they could benefit from establishing a Development Authority; and

WHEREAS, when the Members establish a Development Authority, each second class and third-class city in the county will automatically become a member of the Development Authority; and

WHEREAS, St. Joseph the "County" finds that it is necessary to participate in the Development Authority for the purposes granted to it under the Act, including applying for Fund monies;

NOW, THEREFORE, BE IT ORDAINED BY THE St. Joseph COUNTY COUNCIL, THAT:



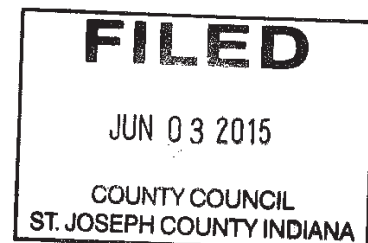
1. The St Joseph County Council finds and determines that it is in the best interest of St Joseph County to authorize the County's participation in the Development Authority as a separate body corporate and politic for the purposes and with all the powers and duties granted to it under the Act.
  2. The St Joseph County Council hereby authorizes St Joseph County's participation in the Development Authority.
  3. The County's membership period will expire eight (8) years from the date of the passage of this Ordinance.
  4. Pursuant to the Act, the Development Authority shall be governed by five (5) individuals appointed by the executives of the Members of the Development Authority who meet the criteria as defined under the Act.
  5. This Ordinance shall be in full force and effect from and after its passage.
- Adopted this 9 day of June, 2015.

Rafael Morton

ATTEST:

\_\_\_\_\_

1st READING  
PUBLIC HEARING  
2nd READING  
NOT APPROVED  
REFERRED  
PASSED





Bill No. 39-15

AMENDMENT NO. \_\_\_\_\_

ORDINANCE NO. 27-15

## AN ORDINANCE AUTHORIZING ST. JOSEPH COUNTY, INDIANA TO PARTICIPATE IN THE ESTABLISHMENT OF A REGIONAL DEVELOPMENT AUTHORITY

This bill came before the St. Joseph County Council the 9 th day of June, 2015, and was voted to duly pass/not to pass, this Ordinance.

Rafael Morton  
President, County Council

### VOTES

YES 8

NO 0  
Absent-Root

### ATTEST:

[Signature]  
Auditor, St. Joseph County

Presented by me to the Board of Commissioners of the County of St. Joseph, Indiana, this 11 th day of June, 2015, at the hour of 3 o'clock P.M.

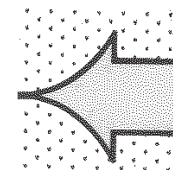
This Ordinance approved and signed by the Board of County Commissioners of St. Joseph County, Indiana, on the 16 th day of June, 2015, at the hour of 10 o'clock A.M.

[Signature]  
President, County Commissioners

[Signature]  
Vice President, County Commissioners

[Signature]  
Member, County Commissioners

Bill No.  
39-15



SIGN  
HERE



### AGREEMENT TO APPOINT THE BOARD OF THE DEVELOPMENT AUTHORITY

WHEREAS, the fiscal bodies of Elkhart, Marshall and St. Joseph counties (collectively, the "Counties") have each adopted an ordinance to establish a Regional Development Authority (the "Development Authority") pursuant to IC 36-7.6 *et seq.*, as amended (the "Act"); and

WHEREAS, the second and third class cities of Elkhart, Goshen, Nappanee, Plymouth, Mishawaka, and South Bend (collectively, the "Cities"), all located in the Counties, join the Development Authority automatically, pursuant to the Act; and

WHEREAS, the Development Authority shall be governed by five (5) individuals (the "Board") who meet the criteria as defined under the Act; and

WHEREAS, the executives of the Cities and Counties (collectively, the "Members") must appoint the Board of the Development Authority by written agreement (the "Agreement");

Now, therefore, as the executives of the Members of the Development Authority, we agree to appoint the following individuals to the Board of the Development Authority, all of whom meet the criteria, as defined under the Act:

1. Dallas Bergl, CEO, Inova Federal Credit Union
2. Pete McCown, President, Elkhart County Community Foundation
3. John DeSalle, V.P. Engineering & Manufacturing, Hoosier Tire
4. John Affleck-Graves, Executive Vice President, University of Notre Dame
5. Regina Emberton, President, Michiana Partnership

This Agreement may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same Agreement.

Agreed this 31<sup>st</sup> day of July, 2015

County of St. Joseph, Indiana

By: Andy Kostielney  
Andy Kostielney, Authorized Commissioner

City of South Bend, Indiana

By: Peter Buttigieg  
Peter Buttigieg, Mayor

City of Mishawaka, Indiana

By: Dave Wood  
Dave Wood, Mayor



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Peter Buttigieg, Mayor

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By: Dave Wood  
Dave Wood, Mayor



Innovate Indiana Capital Expenditures Summary

Pjt #	Project title	Capital Expenditures (\$M)	Private Funding		Local Public Funding		State Public Funding		Other Funding	
			Private Cap Ex Funds (\$M)	Share of Capital Expenditures (%)	Local Public Cap Ex Funds (\$M)	Share of Capital Expenditures (%)	State Public Cap Ex Funds (\$)	Share of Capital Expenditures (%)	Other Cap Ex Funds (\$M)	Share of Capital Expenditures (%)
1	Renaissance District - Studebaker Administration Building	19.7	13.1	67	3.3	17	3.3	17	0.0	0
2	Renaissance District - Studebaker Factory - Phase 3	102.0	62.0	61	20.0	20	20.0	20	0.0	0
3	RCNI Health Education Active Learning Lab (RCNI HEAL)	4.0	2.4	60	0.8	20	0.8	20	0.0	0
4	Additive Manufacturing Demonstration & Training Center	3.1	1.5	49	0.8	25	0.8	25	0.0	0
5	The STREAM Factory	6.2	4.2	68	1.5	24	0.5	8	0.0	0
6	South Bend Code School	0.7	n/a	n/a	0.0	0	0.6	80	0.1	20
7	Project Lead the Way	3.9	1.3	34	1.8	46	0.8	20	0.0	0
8	St. Joseph County Education Alliance	0.0	n/a	n/a	n/a	n/a	0.8	20	0.0	0
9	Ethos Facility	3.6	2.6	71	0.5	15	0.5	15	n/a	n/a
10	Metronet Expansion	11.3	6.8	60	2.3	20	2.3	20	0.0	0
11	Plymouth & Culver Entrepreneurship Center/Business Incubator	8.0	4.8	60	1.6	20	1.6	20	0.0	0
12	Bethel College Free Enterprise Center	7.1	5.4	76	1.4	20	0.3	4	0.0	0
13	Job Training Center	10.4	5.6	54	2.1	21	2.0	19	0.6	6
14	Urban Development Revolving Loan Fund	53.3	37.3	70	8.0	15	8.0	15	0.0	0
16	Blue Ways - Howard Park development	62.8	42.8	68	17.5	28	2.5	4	0.0	0
17	Downtown Elkhart's Market District Blue Zone Initiative	65.0	39.0	60	13.0	20	13.0	20	0.0	0
18	"Ironworks Plaza" Mishawaka Riverfront Mixed-Use Development	39.1	23.5	60	7.8	20	7.8	20	0.0	0
19	The Armory Kitchen and Lofts	1.7	1.0	60	0.4	20	0.4	20	0.0	0
20	Hotel Elkhart development	11.6	8.1	71	1.6	14	1.8	16	0.0	0
22	Goshen Theater Restoration project	12.5	6.0	48	4.0	32	2.5	20	0.0	0
23	Community Natatorium and Fitness Center	32.0	20.0	63	6.0	19	6.0	19	0.0	0
24	Elkhart Field Sports Complex	29.4	20.0	68	5.4	18	4.0	14	0.0	0
25	Goshen Amphitheater Project	1.3	0.8	60	0.3	20	0.3	20	0.0	0
26	Outdoor Entertainment & Arena Space	33.0	28.9	87	2.1	6	2.1	6	0.0	0
27	Apex Climbing and Fitness	3.5	2.5	71	0.3	9	0.7	20	0.0	0
28	Indiana University South Bend/HealthLine Health and Wellness Center	3.8	2.1	56	0.9	24	0.8	20	0.0	0
29	Plymouth Aquatics Center	14.1	8.4	60	2.8	20	2.8	20	0.0	0
30	Plymouth Tennis Courts & Park Pavilion Expansion & Restoration	0.4	0.2	54	0.1	19	0.1	20	0.0	6
32	Riverwalk Mapleheart Connection	0.9	0.5	60	0.2	20	0.2	20	0.0	0
34	Marshall County Trail System	2.9	1.3	45	0.8	28	0.8	28	0.0	0
35	South Shore Infrastructure Renewal & Recaptialization Project	31.7	n/a	n/a	4.8	15	4.8	15	22.2	70
36	Marshall County Infrastructure Development	14.1	7.5	53	2.8	20	2.8	20	1.0	7
40	Marshall County Manufacturing Shell Buildings	12.5	8.8	70	1.3	10	2.5	20	0.0	0
41	Boys & Girls Club Clubhouse	2.5	1.7	66	0.4	14	0.5	20	0.0	0
42	Marshall County Neighborhood Co-Operative	0.0	0.0	60	0.0	20	0.0	20	0.0	0
46	Commerce Center	35.5	21.3	60	7.1	20	7.1	20	0.0	0
ND1	St. Joseph River Hydropower Project in Downtown South Bend	20.0	20.0	100	0.0	0	0.0	0	0.0	0
ND2	The Overlook at Notre Dame	15.0	15.0	100	0.0	0	0.0	0	0.0	0
ND3	Embassy Suites, Eddy Street Commons	25.0	25.0	100	0.0	0	0.0	0	0.0	0
Total		\$703.4	\$451.5	64	\$123.3	18	\$104.7	15	\$24.0	3



### Innovate Indiana Project Portfolio Calendar

Based on timelines in project applications

Proj #	Project Title	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8
1	Renaissance District - Studebaker Administration Building								
2	Renaissance District - Studebaker Factory - Phase 3								
3	RCNI Health Education Active Learning Lab (RCNI HEAL)								
4	Additive Manufacturing Demonstration & Training Center								
5	The STREAM Factory								
6	South Bend Code School								
7	Project Lead the Way								
8	St. Joseph County Education Alliance								
9	Ethos Robotics Program								
10	Metronet Expansion								
11	Plymouth & Culver Entrepreneurship Center/Business Incubator								
12	Belhel College Free Enterprise Center								
13	Job Training Center								
14	Urban Development Revolving Loan Fund								
16	Blue Ways - Howard Park development								
17	Downtown Elkhart's Market District Blue Zone Initiative								
18	"Ironworks Plaza" Mishawaka Riverfront Mixed-Use Development								
19	The Amory Kitchen and Lofts								
20	Hotel Elkhart development								
22	Goshen Theater Restoration project								
23	Community Natorium and Fitness Center								
24	Elkhart Field Sports Complex								
25	Goshen Amphitheater Project								
26	Outdoor Entertainment & Arena Space								
27	Apex Climbing and Fitness								
28	Indiana University South Bend/HealthLine Health and Wellness Center								
29	Plymouth Aquatics Center								
30	Plymouth Tennis Courts & Park Pavilion Expansion & Restoration								
32	Riverwalk Mapleheart Connection								
34	Marshall County Trail System								
35	South Shore Infrastructure Renewal & Recapitalization Project								
36	Marshall County Infrastructure Development								
40	Marshall County Manufacturing Shell Buildings								
41	Boys & Girls Club Clubhouse								
42	Marshall County Neighborhood Co-Operative								
46	Commerce Center								
ND1	St. Joseph River Hydropower Project in Downtown South Bend								
ND2	The Overlook at Notre Dame								
ND3	Embassy Suites, Eddy Street Commons								



### Innovate Indiana Project Portfolio

Pjt #	Location	Project Title	NPV	Total Project Funding (\$M)*	Total Capital Expenditures (\$M)	RCI Funding Request (\$M)	Total Local Funding Match (\$M)
1	St. Joseph County	Renaissance District - Studebaker Administration Building	3.8	19.8	19.7	3.3	3.3
2	St. Joseph County	Renaissance District - Studebaker Factory - Phase 3	61.8	105.4	102.0	20.0	20.0
3	St. Joseph County	RCNI Health Education Active Learning Lab (RCNI HEALL)	3.4	7.2	4.0	0.8	0.8
4	St. Joseph County	Additive Manufacturing Demonstration & Training Center	-0.7	4.1	3.1	0.8	0.8
5	St. Joseph County	The STREAM Factory	-1.2	6.7	6.2	0.5	1.5
6	St. Joseph County	South Bend Code School	0.0	3.6	0.7	0.6	0.0
7	Marshall County	Project Lead the Way	-2.4	6.5	3.9	0.8	1.8
8	St. Joseph County	St. Joseph County Education Alliance	0.2	0.6	0.0	0.0	0.1
9	Elkhart County	Ethos Facility	-0.9	3.6	3.6	0.5	0.5
10	Regional	Metronet Dark Fiber Expansion	-3.3	11.3	11.3	2.3	2.3
11	Marshall County	Plymouth & Culver Entrepreneurship Center/Business Incubator	-2.7	8.5	8.0	1.6	1.6
12	St. Joseph County	Bethel College Free Enterprise Center	-0.5	7.3	7.1	0.3	1.4
13	Marshall County	Job Training Center	-3.1	12.4	10.4	2.0	3.0
14	Regional	Urban Development Revolving Loan Fund	18.8	53.4	53.3	8.0	8.0
16	St. Joseph County	Blue Ways - Howard Park development	-6.9	62.8	62.8	2.5	17.5
17	Elkhart County	Downtown Elkhart's Market District Blue Zone Initiative	7.3	65.0	65.0	13.0	13.0
18	St. Joseph County	"Ironworks Plaza" Mishawaka Riverfront Mixed-Use Development	0.6	39.1	39.1	7.8	7.8
19	St. Joseph County	The Armory Kitchen and Lofts	0.2	1.7	1.7	0.4	0.4
20	Elkhart County	Hotel Elkhart development	2.2	11.6	11.6	1.9	1.6
22	Elkhart County	Goshen Theater Restoration project	-5.6	15.0	12.5	2.5	4.0
23	Elkhart County	Community Natatorium and Fitness Center	0.9	32.0	32.0	6.0	6.0
24	Elkhart County	Elkhart Field Sports Complex	5.9	29.4	29.4	4.0	5.4
25	Elkhart County	Goshen Amphitheater Project	0.1	1.3	1.3	0.3	0.3
26	Elkhart County	Outdoor Entertainment & Arena Space	3.8	33.0	33.0	2.1	2.1
27	Elkhart County	Apex Climbing and Fitness	1.7	3.5	3.5	0.7	0.3
28	St. Joseph County	Indiana University South Bend/HealthLinc Health and Wellness Center	0.5	5.6	3.8	0.8	0.9
29	Marshall County	Plymouth Aquatics Center	-2.9	14.1	14.1	2.8	2.8
30	Marshall County	Plymouth Tennis Courts & Park Pavilion Expansion & Restoration	-0.1	0.4	0.4	0.1	0.1
32	Elkhart County	Riverwalk Mapleheart Connection	-0.3	0.9	0.9	0.2	0.2
34	Marshall County	Marshall County Trail System	-1.3	2.9	2.9	0.8	0.8
35	Regional	South Shore Infrastructure Renewal & Recapitalization Project	-6.1	31.7	31.7	4.8	4.8
36	Marshall County	Marshall County Infrastructure Development	2.6	14.1	14.1	2.8	2.8
40	Marshall County	Marshall County Manufacturing Shell Buildings	-2.8	13.8	12.5	2.5	1.3
41	Marshall County	Boys & Girls Club Clubhouse	-0.6	2.8	2.5	0.5	0.4
42	Marshall County	Marshall County Neighborhood Co-Operative Commerce Center	0.0	0.0	0.0	0.0	0.0
46	St. Joseph County	St. Joseph River Hydropower Project in Downtown South Bend	30.5	40.8	35.5	7.1	7.1
ND1	St. Joseph County	The Overlook at Notre Dame	1.0	20.0	20.0	0.0	0.0
ND2	St. Joseph County	Embassy Suites, Eddy Street Commons	3.1	15.0	15.0	0.0	0.0
ND3	St. Joseph County		13.1	25.0	25.0	0.0	0.0
<b>Total</b>			<b>120.1</b>	<b>731.5</b>	<b>703.4</b>	<b>104.7</b>	<b>124.3</b>

\* Total Project Funding includes project funds identified for Capital Expenditures, Ongoing/Operational Expenses, and other project-related expenses.



## Project #1 - Renaissance District - Studebaker Administration Building

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Shawn E. Peterson
		Renaissance District -- Studebaker Administration Building
		Renaissance District Development – Studebaker Administration Building
		The Renaissance District is a multi-facility complex located along the southern edge of Downtown South Bend. Comprised of the former Studebaker structures, the Renaissance District is a mixed use development of over 1.1 million square feet located around 635 S. Lafayette Street, South Bend, Indiana, including the former Studebaker Administration Building. The Studebaker Administration is not included in Phase 1 of the Studebaker Factory project, which is a multi-phase project currently underway.
		This project provides for reuse of the Studebaker Administration Building as an office space for a technology company. The project will adaptively reuse 145,500 square feet and enhance a complex that will serve as an economic magnet similar in relative scope to the American Tobacco Factory in Durham, North Carolina and 350 Cermak in Chicago, Illinois. The American Tobacco Factory has created hundreds of jobs and 350 Cermak has resulted billions of capital investment.
	Project Description	Studebaker Administration Building will provide work and retail opportunities conducive for millennials, technologists, and professional workers
	Project Location	635 S. Main Street, South Bend, St. Joseph County, Indiana
	Project Category	Innovation and technology
Project Timeline	Industry Alignment	Technology
	Project Partners	Union Station Technology Center (and other confidential partners) Experienced Developer Premier Redevelopment Capital Partner
	Project Experience	Examples will be available upon execution of an NDA. All partners, however, have performed projects well in excess of this one.

Project Timeline	Project Start Date	7/1/2015
	Project End Date	10/15/2016
	Start within 12 months?	Yes
	Project Timeline	A detailed project schedule is available upon a request and upon an execution of an NDA.

1	Year 1 capital expenditures (\$)	\$14,300,000.00
	Year 2 capital expenditures (\$)	\$5,445,000.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$19,745,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$48,000.00
	Total project budget	\$19,793,000.00



Project Budget & Funding	<b>Description of Capital Expenditures</b>	The project will include the rehabilitation of the former Studebaker Administration Building. No tenant equipment is included. A detailed budget is available upon the execution of an NDA
	<b>Description of Ongoing Expenditures</b>	General maintenance
	<b>Total project budget</b>	\$19,793,000.00
	<b>Local public funding</b>	\$3,300,000.00
	<b>Private funding</b>	\$13,200,000.00
	<b>Non-profit funding</b>	\$0.00
	<b>Other funding</b>	\$0.00
	<b>RCI funding required?</b>	Yes
	<b>RCI funding needed</b>	\$3,300,000.00
	<b>RCI funding proportion of cap ex</b>	17%
	<b>Total private funds</b>	\$13,200,000.00
	<b>Private ratio calc</b>	67
	<b>Total public funds</b>	\$6,600,000.00
	<b>Public ratio calc</b>	33
	<b>Other</b>	\$0.00
	<b>Other ratio calc</b>	0
	<b>Total funding</b>	\$19,800,000.00
	<b>Variance between budget &amp; funding</b>	\$7,000.00
	<b>Private/public/other funding ratio</b>	67 / 33 / 0
Project Impact	<b>Project impact and alignment with local or regional plans</b>	The project will attract more than 400 new jobs to a low-income area and enhance South Bend's position as top place for technology companies.
	<b>Anticipated return on investment (%)</b>	25
	<b>Description of anticipated return on investment</b>	The project will produce over 440 jobs with payroll of \$24.2 million resulting in 822,800 in state income taxes to the State
	<b>Annual sales or other non-tax revenue generated (\$)</b>	822800
	<b>Description of annual sales or other non-tax revenue generated</b>	see above
	<b>Jobs created (if applicable)</b>	440
	<b>Description of jobs created (if applicable)</b>	These will be professional level jobs and approximately 8 retail jobs



### Project #2 - Renaissance District - Studebaker Factory Phase 3

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Shawn E. Peterson
	Project Description	<p>Renaissance District Development – Studebaker Factory -- Phase 3</p> <p>The Renaissance District is a multi-facility complex located along the southern edge of Downtown South Bend. Comprised of the former Studebaker structures, the Renaissance District is a mixed use development of over 1.1 million square feet located around 635 S. Lafayette Street, South Bend, Indiana. Phase 1 of the project has commenced and will consist of an initial investment of \$30 million to stabilize the complex, provide for the expansion and relocation of Deluxe Sheet Metal to the facility and enable an initial expansion for Union Station Technology Center. This will include full renovation and occupation of Building 112 and an initial phase of development in Building 113. Phase 2 includes the investments needed to fully occupy Building 113.</p> <p>Phase 3 provides for reuse of Building 84 as a data center, research and technology grade office space and residential apartments. The project will adaptively reuse 545,500 square feet and create for the region an economic magnet similar in relative scope to the American Tobacco Factory in Durham, North Carolina and 350 Cermak in Chicago, Illinois. The American Tobacco Factory has created hundreds of jobs and 350 Cermak has resulted billions of capital investment. Building 84 will provide a technology hub with a live-work environment for millennials, technologists, and researchers.</p>
	Project Location	635 S. Lafayette Boulevard, South Bend, St. Joseph County, Indiana
	Project Category	Innovation and technology
	Industry Alignment	Telecommunications
	Project Partners	<p>Union Station Technology Center (other confidential partners)</p> <p>Experienced Mixed Use Developer</p> <p>Internationally Awarded Architectural Firm</p> <p>Premier Redevelopment Capital Provider</p>
	Project Experience	Examples will be provided once partners are formally announced or pursuant to an NDA. All traditionally perform transactions in excess of the projected capital investment
Project Timeline	Project Start Date	2/1/2017
	Project End Date	8/30/2019
	Start within 12 months?	Yes
	Project Timeline	<p>Phase 3 will commence upon the completion of the infrastructure aspects for Phase 1 unless project schedules enable sufficient coordination. Significant design activities are occurring now.</p> <p>Creating the additional office space is contingent upon having access to one or more parking structure which are included in the estimates.</p>
	Year 1 capital expenditures (\$)	
	Year 2 capital expenditures (\$)	
	Year 3 capital expenditures (\$)	\$24,000,000.00
	Year 4 capital expenditures (\$)	\$53,000,000.00
	Year 5 capital expenditures (\$)	\$25,000,000.00
	Total Capital Expenditures	\$102,000,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$3,403,000.00
	Total project budget	\$105,403,000.00



Project Budget & Funding	<b>Description of Capital Expenditures</b>	\$32,540,688 -- Core and Shell Improvements \$14,400,000 -- Commercial Tenant Improvements \$17,449,259 -- Power Equipment \$ 3,610,000 -- Residential Improvements \$ 9,000,000 -- Power Infrastructure \$25,000,000 -- Development of a Parking Structure
	<b>Description of Ongoing Expenditures</b>	The project of this type and size has significant operational and maintenance requirements. This estimate include payroll, vendor services, parts and equipment requirements
	<b>Local public funding</b>	\$20,000,000.00
	<b>Private funding</b>	\$65,403,000.00
	<b>Non-profit funding</b>	\$0.00
	<b>Other funding</b>	\$0.00
	<b>RCI funding required?</b>	Yes
	<b>RCI funding needed</b>	\$20,000,000.00
	<b>RCI funding proportion of cap ex</b>	20%
	<b>Total private funds</b>	\$65,403,000.00
	<b>Private ratio calc</b>	62
	<b>Total public funds</b>	\$40,000,000.00
	<b>Public ratio calc</b>	38
	<b>Other</b>	\$0.00
	<b>Other ratio calc</b>	0
	<b>Total funding</b>	\$105,403,000.00
	<b>Variance between budget &amp; funding</b>	\$0.00
	<b>Private/public/other funding ratio</b>	62 / 38 / 0
Project Impact	<b>Project impact and alignment with local or regional plans</b>	Union Station Technology Center is a Top 40 carrier hotel in the nation and whose technology and position enabled South Bend to be featured by Cisco Systems as a Top 9 Most Connected city in the world. The project has been featured in Forbes and has been promoted internationally.  The project aligns with developing urban redevelopment opportunities and will enable additional retail, early childhood and other educational opportunities. It will also supplement Phase 2 projects projected to be installed into the building.
	<b>Anticipated return on investment (%)</b>	16.24
	<b>Description of anticipated return on investment</b>	The above investment will result in technology tenant taxable expenditures of over \$9,000,000 per year resulting in \$630,000 in annual sales tax. Additionally, \$77,000,000 in estimated payroll is expected producing \$2,618,000 in state tax revenue annually.
	<b>Annual sales or other non-tax revenue generated (\$)</b>	3616200
	<b>Description of annual sales or other non-tax revenue generated</b>	See above
	<b>Jobs created (if applicable)</b>	1400
	<b>Description of jobs created (if applicable)</b>	Approximately 34 permanent maintenance and operational jobs will be created along with 1,366 professional, educational, customer service and technology worker jobs.



## Project #3 - Health Education Active Learning Lab

Project Information	
<b>Project Contact</b>	Terry L. Allison, Chancellor, Indiana University South Bend
<b>Project Description</b>	<p>Project Title: Regional Cities of Northern Indiana Health Education Active Learning Lab (RCNI HEALL)</p> <p>Indiana University South Bend, in partnership with several regional colleges and universities, hospitals, and public health and agencies, proposes the development of a modern 15,000 square-foot (estimated) regional health simulation education learning downtown South Bend's Renaissance District. RCNI HEALL would be used as a centralized, interdisciplinary clinical skills lab for regional health education and professional development programs in nursing and medicine, including simulation environments care, virtual hospital, and an acute care unit (emergency trauma and ICU).</p> <p>The center's mission would be to provide a state-of-the-art replica of patient care environments where health care providers can apply cognitive, psychomotor and affective skills, both individually by discipline and in an interdisciplinary approach. The vision simulation center would be to instruct and facilitate learning while objectively measuring a learner's performance and competencies in a health care environment.</p> <p>The establishment of RCNI HEALL in the four-county region served would provide a resource that would lead to improved health education and training for a growing regional health work force, as well as improved health care for citizens in the communities educated and clinically trained doctors, nurses, and other practitioners. Ultimately, this project helps the region to develop its local industry, health care, while improving health outcomes, thereby lowering the per-patient cost of medical care borne by individuals.</p>
<b>Project Location</b>	635 S. Lafayette Boulevard (Renaissance District Phase II), South Bend, St. Joseph County, IN
<b>Project Category</b>	Education and incumbent workforce
<b>Industry Alignment</b>	Healthcare and Education
<b>Project Partners</b>	<p>Indiana University South Bend and its Vera Z. Dwyer College of Health Sciences would be the primary operator of the simulation facility. Dwyer College was the recent recipient of \$6.85 million in private philanthropy to strengthen and expand programs, including a challenge gift of \$1 million for the development of a campus-based Health and Wellness Center. Donors have also expressed interest in the future development of a regional patient simulation laboratory.</p> <p>Additional institutions that have acknowledged their support for the proposed facility include:</p> <ul style="list-style-type: none"> <li>Indiana University School of Medicine – South Bend</li> <li>Saint Mary's College Department of Nursing</li> <li>Ivy Tech Community College – South Bend</li> <li>Goshen College</li> <li>Bethel College</li> <li>Beacon Health Systems (Memorial Hospital, Elkhart General Hospital)</li> <li>St. Joseph Regional Medical Center</li> <li>IU Health Goshen Hospital</li> </ul> <p>Additionally, the concept of the RCNI HEALL has the capacity to attract students from outside the four-county region. Northwest College of Health and Human Services and IU School of Medicine –Northwest, have expressed need and interest in the project.</p>
<b>Project Experience</b>	<p>As part of the state-wide IU network, IU South Bend and project partners have direct access to comprehensive experience in planning, construction, and management of similar patient simulator laboratories, such as The Simulation Center at Hall at the IU School of Medicine at IUPUI, and recently constructed nursing simulation laboratories at IUPUI-Columbus Kokomo.</p> <p>IU South Bend and its partners in this project have long collaborated with the regional health care industry in providing training opportunities for students. IU South Bend has also partnered with the private sector to build and renovate educational facilities, notably its newly-renovated Roger S. Pecina Dental Education Clinic, which serves over 2,500 patients. IU is currently working in partnership to become a federally qualified health center so that the Health and Wellness Center primarily serving students, will be able to provide greatly expanded primary care for the community.</p>



Project Timeline	Project Start Date	7/1/2015
	Project End Date	12/31/2017
	Start within 12 months?	Yes
		7/1/15-12/31/15 – Fundraising, Project Planning and Design 1/1/16-10/31/16 – Construction 11/1/16-12/31/17 – Staffing, Course/Program Development, Marketing 1/1/18 – Grand Opening
	Project Timeline	

Project Budget & Funding	Year 1 capital expenditures (\$)	\$4,014,000.00
	Year 2 capital expenditures (\$)	\$0.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$4,014,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$948,000.00
	Total project budget	\$4,962,000.00
	Description of Capital Expenditures	Planning and Design: \$180,000 Construction: \$2,334,000 (15,000 square feet at an estimated \$155.40 per square foot, based on lab space construction similar IU facilities) Furnishings, Fixtures, and Simulation Equipment: \$1,500,000 (based on simulation lab FFE at similar IU facilities) Total Build Out/Leasehold Improvements: \$4,014,000
	Description of Ongoing Expenditures	Operations: Staffing: Approximately \$600,000 per year for 7 employees, including a director (\$80,000+benefits), five simulation I technicians (approximately \$60,000+benefits), and a scheduling/administrative assistant (\$35,000+benefits). Lab Maintenance: \$60,000 per year (12% of Furniture, Fixtures, Equipment investment) Consumable Supplies: \$60,000 per year Travel Expense: \$10,000 per year Lease and Utilities: \$225,000 per year (\$15 per square foot)
	Total project budget	\$4,962,000.00
	Local public funding	\$802,800.00
	Private funding	\$1,003,500.00
	Non-profit funding	\$1,404,900.00
	Other funding	\$3,211,200.00
	RCI funding required?	Yes
	RCI funding needed	\$802,800.00
	RCI funding proportion of cap ex	20%
	Total private funds	\$2,408,400.00
	Private ratio calc	33
	Total public funds	\$1,605,600.00
	Public ratio calc	22
	Other	\$3,211,200.00
	Other ratio calc	44
	Total funding	\$7,225,200.00
	Variance between budget & funding	\$2,263,200.00
	Private/public/other funding ratio	33 / 22 / 44



Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>Patient simulation can be used to strengthen health care education and the health care industry across a region in several ways: 1) As a re-engage secondary and post-secondary students about career opportunities in medical education through observation of cutting edge technology currently in use; 2) Increase the completion rates of health care education programs by keeping students actively involved in learning through practice; 3) Allow health and emergency care providers, including nursing homes, hospice providers, EMS, Homeland Security, Red Cross Response providers, and more, to access career advancement training, update professional practices, and increase retention of providers practice through ongoing professional development.</p> <p>The proposed RCNI HEALL project aligns closely with the projected rapid growth of the health care industry in the region. IU South Bend's workforce and degree program needs through its new Academic Master Plan, 2014-2020. Evidence indicates a strong need for significant health science programs, particularly nursing, medical lab science, pharmaceutical science, and radiography. Expansion is also pending at IU of Medicine-South Bend.</p> <p>IU South Bend and its partner colleges and universities who offer medical and nursing education individually have small simulation labs with mannequins. Rather than our individual programs continuing to add duplicative mannequins and advanced software which would be used for short periods, it would be much more economical to collaborate across institutions to create a simulation center. This center would have 10 mannequins representing life stages from obstetrics to gerontology and multiple software packages to simulate a broad range of illnesses or trauma. This lowers each institution's cost while providing a much wider range of education for students as well as current health professionals.</p> <p>Similar to The Simulation Center at Fairbanks Hall at IUPUI, the versatile RCNI HEALL would be able to be configured as virtual environments for offices, hospital suites, radiography suites, operating rooms and emergency rooms. Current and future doctors, nurses, and technicians will practice applied clinical skills on mannequins that respond like real patients, immerse themselves in computer-simulated surgery, and react to emergency room dramas.</p> <p>The proposed RCNI HEALL project would jointly benefit health education programming at IU South Bend's Vera Z. Dwyer College of Health and Behavior as well as several other health education programs at partner institutions in the region. All partners have recognized and support the need for a modern, and interdisciplinary patient simulation laboratory.</p> <p>Currently, Indiana University is in the early phase of a multi-billion dollar, state-wide capital campaign, entitled "FOR ALL: The Indiana University Bicentennial Campaign," which celebrates the university's 200th anniversary in 2020. One of the major campaign themes of this campaign is "Healthier State, Nation, and World." The IU partners in this project consortium recognize the importance of this theme in planning priorities for health education within the region.</p>
	<b>Anticipated return on investment (%)</b>	17.5
	<b>Description of anticipated return on investment</b>	Based on the state's investment of \$802,800 to construct the facility, it is estimated that annual state payroll tax on tuition at RCNI HEALL would yield about \$14,525 per year. Additionally, 7% state sales tax on student/user expenditures (\$1,800,000/year) would yield \$126,000, for an estimated total of \$140,525 per year, or 17.5% of the state grant. Given this formula, the state's investment would be repaid in approximately 5.7 years.
	<b>Annual sales or other non-tax revenue generated (\$)</b>	5675000
	<b>Description of annual sales or other non-tax revenue generated</b>	<p>Health Education:</p> <p>Average annual payroll of \$725,000 for HEALL staff</p> <p>Average annual user fees of \$150,000 from third party organizations (public safety, nursing homes, etc.)</p> <p>Annual student/user spending of approximately \$1,800,000 (\$10 per day per user)</p> <p>Annual tuition revenue of approximately \$3,000,000</p> <p>The RCNI HEALL facility will be structured as a self-sustaining auxiliary enterprise, with user partners contributing for and fees to underwrite the cost of operations through cooperative agreements and/or usage fees for non-educational users (EMT's, fire and rescue, technicians). Indirect economic impact will be driven by students and users (housing, fuel, food supplies, books, computers and software, safety items, lab clothing).</p>



Jobs created (if applicable)	7
Description of jobs created (if applicable)	<p>Direct Health Education Jobs (7) at the RCNI HEALL:</p> <p>Director of Patient Simulation Center – management at \$80,000 + benefits (average 3% annual increase)</p> <p>Five Simulation Education Technicians – professional staff at \$60,000 + benefits (3% annual increase)</p> <p>One Scheduling Administrator – biweekly staff - \$30,000 + benefits (3% annual increase)</p> <p>Indirect Job Growth:</p> <p>Additionally, due to the educational nature of the project, IU South Bend and partner institutions contribute to the development qualified workforce for the regional health care industry.</p> <p>According to the U.S. Bureau of Labor Statistics, occupations and industries related to health care are projected to add the most jobs between 2012 and 2022. National health care employment is projected to increase 10.8 percent, or 15.6 million, during the decade. A study for IU's regional campuses conducted by Deloitte indicated projected growth of jobs in the industries served by the region. For the IU South Bend region, the largest expected demand among industry groups is in health care practitioners and technicians, expected to grow 17% over ten years, adding 2,421 jobs due to growth and needing 3,442 more due to replacements.</p> <p>IU South Bend will be adding five new advanced practice nursing specialties to its graduate nursing degree program over the next five years, estimated to attract an additional 50 students per year. IU School of Medicine-South Bend is participating in a phased-in 30% increase in the statewide medical school class size. The final phase of the expansion will be completed in 2016. At that juncture, IUSM-SB will enroll 150 students in each of first and second years. IUSM-SB foresees a future in which their third and fourth year classes each enroll 150 students, although larger class sizes are possible. In addition, students from throughout the regional campus system are temporarily assigned to IUSM-SB for a specific rotation. South Bend frequently hosts students for family medicine and pediatric rotations. In 2015, the South Bend community hosts up to 100 medical students.</p> <p>All of the colleges and universities with nursing programs in our consortium will have stronger capacity to expand their annual enrollment due to having access to a modern interdisciplinary patient simulation laboratory that provides essential clinical training.</p> <p>Ultimately, the RCNI HEALL is needed to help educate providers and fill an estimated 5,863 health care jobs across the four-county region over the next ten years.</p> <p>Future Physicians: \$170,000 average salary + benefits for Indiana</p> <p>Future Nurse RN: \$64,000 average salary + benefits for Indiana</p>



## Project #4 - Advanced Manufacturing and Design Center

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Bob Sutton
	Project Description	Additive Manufacturing Demonstration and Training Center. We will create a demonstration center for professional grade 3D Printing in which we will provide printing services for regional companies as well as process development and training. We will work in conjunction with local universities and colleges to provide internship opportunities for students in technical programs as well as provide classroom and laboratory training that extends well beyond the usual desktop training currently available. As ancillary functions we will support innovation based start-ups with rapid prototyping services, and serve as a regional showroom and training center for high tech printers; attracting potential sales and training clients from the entire Midwest if not nationwide. We are not aware of any other such training and development center in operation within the U.S.
	Project Location	Renaissance District Phase II, 635 South Lafayette Blvd, South Bend, St. Joseph County Indiana. Renovation site of Studebaker Main Assembly Building.
	Project Category	Innovation and technology
	Industry Alignment	Manufacturing - All
	Project Partners	South Bend Renaissance District 2 Higher Education Institutions (Names confidential at this time) 1 Major manufacturer of Professional and production grade 3D Printers 1 Medical Device Company (Name is confidential at this time) 2 Global Manufacturers (Names confidential at this time)
	Project Experience	Renaissance District Personnel have already demonstrated the ability to build new innovation and technology based organizations on the foundations of old industrial sites as witnessed by the Union Station Technology Center. The higher education institutions and manufacturing partners are all healthy organizations that have already demonstrated their ability to succeed in both entrepreneurial and academic environments.

Project Timeline	Project Start Date	8/3/2015
	Project End Date	12/30/2016
	Start within 12 months?	Yes
	Project Timeline	Q3 2015 Initial facility move in will occur in Q3 of 2015 with the first printer installed within a month of move in. Initial sales, production, and training staff hired. Q4 2015: 2 Production Grade Machines installed along with related support facilities. Initial education curricula formed and ready for implementation in Spring 2016 semester. 8 paid interns hired to provide round the clock operations support. Q1 2016: 3rd Production Grade machine installed, begin paid private training program. Q2 2016: By end of Q2 all ASTM recognized additive technologies will be represented and available for both training and production. Q4 2016: Full capacity operations enabled, plan for growth set.

Year 1 capital expenditures (\$)	\$1,290,000.00
Year 2 capital expenditures (\$)	\$1,830,000.00
Year 3 capital expenditures (\$)	\$0.00
Year 4 capital expenditures (\$)	\$0.00
Year 5 capital expenditures (\$)	\$0.00
Total Capital Expenditures	\$3,120,000.00



Project Budget & Funding	Ongoing expenditures for operations, maintenance, etc. (\$)	\$950,000.00
	Total project budget	\$4,070,000.00
	Description of Capital Expenditures	Capital expenditures will primarily be for professional and production grade additive manufacturing equipment (Printers). Approximately 25% will go toward support equipment and modern (showplace quality) facilities.
	Description of Ongoing Expenditures	Rent, basic utilities, machine maintenance, staff payroll for machine operators and full time trainers.
	Local public funding	\$793,870.00
	Private funding	\$2,381,610.00
	Non-profit funding	\$0.00
	Other funding	\$100,650.00
	RCI funding required?	Yes
	RCI funding needed	\$793,870.00
	RCI funding proportion of cap ex	25%
	Total funding	\$4,070,000.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	59 / 39 / 2

Project Impact	Project impact and alignment with local or regional plans	1) High end additive manufacturing (3D Printing) is the evolving front of manufacturing but is not well embraced in our local manufacturing culture. We will enhance awareness, preparedness, and base capabilities for all local manufacturers. This should allow them to ride the wave of change within manufacturing rather than being left behind. 2) Enhance educational capabilities at all local colleges and universities by providing an educational platform as well as intern employment/training opportunities for their students. 3) Provide a modern high technology demonstration center to attract additional high technology, aerospace, and biotech firms to our region. This is intended to be a showplace as well as a production and educational facility. 4) Provide job training opportunities for local workers struggling to learn 21st century manufacturing techniques. 5) Work as an enabling resource to support innovation based start-ups needing rapid prototyping and manufacturing assistance.
	Anticipated return on investment (%)	10.5
	Description of anticipated return on investment	Anticipated return is based on Direct jobs created in the education center plus regional jobs added by enhancing the ability of regional manufacturers and startups to compete in the field of Additive Manufacturing.
	Annual sales or other non-tax revenue generated (\$)	850000
	Description of annual sales or other non-tax revenue generated	Sale of prototype and production parts generated for manufacturers within the region and worldwide, educational fees for education and training provided, sales commissions on machine sales enabled by our demonstration center.
	Jobs created (if applicable)	25
	Description of jobs created (if applicable)	Machine operation, pre- and post-processing of parts, machine maintenance, trainers.



## Project #5 - STREAM Factory

Project Information	
<b>Project Contact</b>	Dr. Katherine Rueff
<b>Project Description</b>	<p>The STREAM Factory</p> <p>The Michiana Science and Technology Center, Inc. (MSTCi) is developing a dynamic STEM (science, technology, engineering, and mathematics) hands-on center in the South Bend downtown area to provide project-based learning space, K-12 and educator professional development, and a centralized community STEM resource facility for the northern Indiana region.</p> <p>The STREAM Factory (Science Technology Research Engineering Art &amp; Architecture Mathematics) will be the primary STEM education hub in the northern Indiana region. The STREAM Factory is designed around the 8 economic sectors of the region to develop a thriving STEM workforce for current and future industries and employers.</p> <p>The facility will provide an innovative exhibit space for students, career development classrooms and laboratory space, and a STEM resource area with a lending library for educators and the community. Additionally, The STREAM Factory will provide continued professional development courses for K-12 educators and parents.</p>
<b>Project Location</b>	South Bend downtown Renaissance District, St. Joseph County 635 South Lafayette Street, South Bend, IN
<b>Project Category</b>	Education and incumbent workforce
<b>Industry Alignment</b>	Regional technology and manufacturing industries
<b>Project Partners</b>	<p>MSTCi has direct and informal relationships with the following partners who have supported and continue to support our endeavors and activities:</p> <p>University of Notre Dame, Purdue University, Indiana University South Bend, St. Mary's College, Ivy Tech, South Bend Community Schools Corporation, Penn-Harris-Madison School Corporation, Elkhart Community Schools, Notre Dame QuarkNet, Innovation Park, enFocus, Joint Institute for Nuclear Astrophysics, Notre Dame Center for STEM Education, SJC Public Libraries, ETHOS, Michiana Astronomical Society, Thorne-Grodnik LLP, Project Lead The Way, Chamber of Commerce, Union Station Technology Center</p>
<b>Project Experience</b>	<p>MSTCi is a 501(c)(3) non-profit, STEM education organization located in the northern Indiana region, incorporated in 2013. Throughout that time MSTCi has provided and managed STEM expos, educational forums, and hands-on exhibits along side its many community partners.</p> <p>In 2015 MSTCi will launch a comprehensive, online searchable STEM resource database. The STEM database will provide the community with access to detailed information about regional STEM events, educational experiences and employment opportunities, such as internships.</p> <p>The MSTCi Board is comprised of local community leaders and educators including members from academia, public education, engineering, marketing, law, and small businesses.</p>



Project Timeline	Project Start Date	1/1/2016
	Project End Date	12/31/2020
	Start within 12 months?	Yes
	Project Timeline	<p>Phase 1: Online STEM database Time frame: Launch in Summer – Fall 2015 Primary Goal &amp; Focus: -Create and implement a comprehensive regional digital STEM resource database</p> <p>Phase 2: Pilot educational space Facility space needed: 2500 SQFT Time frame: Launch in 2016 Primary Goal &amp; Focus: -Classrooms for youth programs and professional development -Lending library for educators and community -Prepare, fundraise, and initiate Phase 3</p> <p>Decision points: -Finalize location and allocated space -Hiring operational personnel</p> <p>Phase 3: The STREAM Factory Facility space needed: 30,000+ SQFT Time frame: Soft Launch 2018, Full Launch 2020 Primary Goal &amp; Focus: -Fully developed STEM exhibit center, operational offices, classroom space, and resource area Decision points: -Finalize location and allocated space -Secure diverse income portfolio -Identify industry sponsors, partners, and collaborators</p>

Year 1 capital expenditures (\$)	\$70,000.00
Year 2 capital expenditures (\$)	\$100,000.00
Year 3 capital expenditures (\$)	\$3,000,000.00
Year 4 capital expenditures (\$)	\$2,000,000.00
Year 5 capital expenditures (\$)	\$1,000,000.00
Total Capital Expenditures	\$6,170,000.00
Ongoing expenditures for operations, maintenance, etc. (\$)	\$500,000.00
Total project budget	\$6,670,000.00



### Project Budget & Funding

<b>Description of Capital Expenditures</b>	<p>There will be varying amounts of expenditures throughout the 3 project phases.</p> <p>Phase 1 expenditures: \$10k</p> <ul style="list-style-type: none"> <li>-Database development and online hosting</li> </ul> <p>Phase 2 expenditures: \$70k</p> <ul style="list-style-type: none"> <li>-Facility development</li> <li>-Operational and personnel</li> <li>-Supplies and utilities</li> </ul> <p>Phase 3 expenditures: \$6 million</p> <ul style="list-style-type: none"> <li>-Facility development</li> <li>-Exhibit design and production</li> <li>-Operational and personnel</li> <li>-Supplies and utilities</li> </ul>
<b>Description of Ongoing Expenditures</b>	-Facility costs for leasing space, utilities, taxes, personnel salaries and benefits, program development, operational and administrative costs, exhibit development, and Facility supplies.
<b>Local public funding</b>	\$1,500,000.00
<b>Private funding</b>	\$1,500,000.00
<b>Non-profit funding</b>	\$3,000,000.00
<b>Other funding</b>	\$200,000.00
<b>RCI funding required?</b>	Yes
<b>RCI funding needed</b>	\$470,000.00
<b>RCI funding proportion of cap ex</b>	8%
<b>Total private funds</b>	\$4,500,000.00
<b>Private ratio calc</b>	67
<b>Total public funds</b>	\$1,970,000.00
<b>Public ratio calc</b>	30
<b>Other</b>	\$200,000.00
<b>Other ratio calc</b>	3
<b>Total funding</b>	\$6,670,000.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	67 / 30 / 3

<b>Project impact and alignment with local or regional plans</b>	<p>A centralized facility for STEM education and career development will provide the region with the necessary resources and connections to industries to develop a thriving STEM workforce pipeline. The facility would give regional students access to 21st century STEM experiences and curriculum. The northern Indiana region is the ideal location for this facility in Indiana because of the current need for qualified STEM professionals to strengthen the existing and growing STEM industries. The northern Indiana region additionally has been making dedicated efforts to improve STEM education through programs such as Project Lead The Way, the surrounding universities, and technology-driven industry attractors, such as Innovation Park and Ignition Park.</p> <p>The STREAM Factory exhibits will showcase regional business in the 8 identified economic sectors that rely on and recruit a STEM workforce. By providing this targeted hands-on education experience, the facility services both the educational and industry needs of the northern Indiana region. These 8 economic sectors include:</p> <ul style="list-style-type: none"> <li>-Academia &amp; Research</li> <li>-Accounting, Finance, Business, &amp; Real Estate</li> <li>-Agriculture, Food, and Culinary Arts</li> <li>-Art &amp; Architecture</li> <li>-Engineering, Manufacturing, &amp; Construction</li> <li>-Government, Law, &amp; Logistics</li> <li>-Health &amp; Medicine</li> <li>-Information Technology</li> </ul>
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Project Impact	Anticipated return on investment (%)	9
	Description of anticipated return on investment	<p>Anticipated return on investment is based on economic impact driven by development of a sustainable STEM workforce. Based on national studies of successful science and technology centers, the return on investment for workforce development is between 1.5-1.7 multiplier for investment in STEM metropolitan regions. Based on these studies and estimating the economic growth of the northern Indiana region we break down the ROI by students impacted and developed to become STEM employees.</p> <p>Lower-limit estimates:  Regional total population = 800,000  Regional student population = 200,000  Program student population impact = 20,000 (10% of total student for 6th-8th grade target population)  STEM workforce development = 200 (1% of students taking STEM employment)  Average STEM employment wage (2011 estimates) = \$53,000  STEM workforce x wage = 200 x \$53,000 = \$10.6 million</p> <p>ROI = (\$10.6 million [gain] - \$9.7 million [5 year cost]) / \$9.7 million = 0.09</p> <p>This is with the understanding that the students are developed in 6th-8th grade and the ROI impact is gained after the student completes high school and enters the workforce.</p> <p>There is an additional ROI if these students enter four-year and vocational programs in the northern Indiana region. Additionally, this ROI is conservative in its calculation of salary due to inflation over the 5 year development period.</p>
	Annual sales or other non-tax revenue generated (\$)	250000
	Description of annual sales or other non-tax revenue generated	Due to the educational and community focused nature of the STEM facility, revenue generation will be driven by admission sales, program development fees, and retail sales. These funds will generate no more than 50% of revenue with the remaining funds for operational costs coming from public and private funding sources. The annual operating budget of \$500,000 would generate a conservative \$250,000 in revenue.
	Jobs created (if applicable)	34
	Description of jobs created (if applicable)	<p>The facility will drive jobs in construction and manufacturing during the development phases. The facility will employ up to 4 full-time positions within the 5 year project time period, with additional part-time positions created on an as-needed basis. Additional work force will be required to support the custodial, maintenance, and facility needs throughout the development, launch, and operational time period.</p> <p>10 or more part-time jobs will be created for local high school students to help run the enterprise while learning 21st century skills, including the following, in addition to exposure to and involvement with STEM fields directly:</p> <ul style="list-style-type: none"> <li>-Creativity and Innovation</li> <li>-Critical Thinking and Problem Solving</li> <li>-Communication and Collaboration</li> <li>-Flexibility and Adaptability</li> <li>-Initiative and Self-Direction</li> <li>-Social and Cross-Cultural Skills</li> <li>-Productivity and Accountability</li> <li>-Leadership and Responsibility</li> </ul>



## Project #6 - South Bend Code School

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Alex Sejdinaj
	Project Description	South Bend Code School - We are creating workforce training that will equip potential employees with the web development skills needed to obtain jobs at technology focused companies. We will generate over two hundred trained workers to fill positions in the next 5 years, totaling over 13 million dollars in regional salaries while enabling technology companies and startups to grow as well as encourage like minded companies to move to or start up in our region.
	Project Location	This project will be located in South Bend, IN, and will serve the entire region.
	Project Category	Education and incumbent workforce
	Industry Alignment	Technology
	Project Partners	Although we do not have any official partners, we have spoken with several owners and CEOs of tech companies in the area who are very supportive of our efforts. Those we have spoken with include: Gary Gigot (Vennli) Craig Sroda (Pinnacle) Tracy Graham (Data Realty & Aunalytics)
	Project Experience	The project team has experience in the following areas related to our mission and goals: Hiring for technology companies. Teaching technical skills. Working for technology companies. Attending a software school. Working for startups or starting up companies.
Project Timeline	Project Start Date	6/22/2015
	Project End Date	4/30/2020
	Start within 12 months?	Yes
	Project Timeline	1/07/15: Solidify project plan and scope. 1/12/15: Have site selected and move in ready as well as have instructors hired and set up with curriculum. 1/15/16: First cohort begins training. 3/15/16: First cohort graduates and obtains internships at local companies. (Repeat two more times through year one making any adjustments as needed) 1/15/17: Year two commences, class size is evaluated. We decide if we can increase the number of students per cohort. (Year two progresses yielding 3 more cohorts) 1/15/18: Year three begins with the goal of doubling the number of cohorts per year.



Project Budget & Funding	Year 1 capital expenditures (\$)	\$222,500.00
	Year 2 capital expenditures (\$)	\$72,500.00
	Year 3 capital expenditures (\$)	\$140,000.00
	Year 4 capital expenditures (\$)	\$140,000.00
	Year 5 capital expenditures (\$)	\$150,000.00
	Total Capital Expenditures	\$725,000.00
	operations, maintenance, etc. (\$)	\$2,166,000.00
	Total project budget	\$2,891,000.00
	Description of Capital Expenditures	Main capital expenditures consist of computing equipment, classroom equipment, and teaching supplies. Year one consists of startup costs in the time leading up to launch plus capital expenditures of year one.
	Description of Ongoing Expenditures	Total = \$2,166,000. Description: The ongoing expenditures consist of instructor and administrative salaries, rent, and supplies for 5 years.
	Local public funding	\$0.00
	Private funding	\$0.00
	Non-profit funding	\$0.00
	Other funding	\$3,031,200.00
	RCI funding required?	Yes
	RCI funding needed	\$578,200.00
	RCI funding proportion of cap ex	80%
	Total funding	\$3,609,400.00
	Variance between budget & funding	\$718,400.00
	Private/public/other funding ratio	0 / 16 / 84



Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>South Bend Code School will generate 280 technical jobs over the next 5 years. Each new technical position hired fuels company growth and increases our region's competitiveness as a great place for technologists to work. As these companies grow, more jobs will become available.</p> <p>Our code school is in alignment with local plans and initiatives like Innovation Park, Union Station, and the growing tech community in South Bend. As those initiatives bring in more technically focused companies to the region, we see the ability to bridge the technical gap. The South Bend Tech CEO Roundtable (C-Change) is also in support of a venture along these lines.</p>
	<b>Anticipated return on investment (%)</b>	1238.85%
	<b>Description of anticipated return on investment</b>	<p>Direct ROI = (Total Revenue - Total Expense)/Total Expense  Indirect ROI = (5 Year Community Impact Salaries - Total Expense)/Total Expense  Total ROI = (((Total Revenue + 5 Year Community Impact Salaries) - Total Expense)/Total Expense)</p> <p>5 Year Revenue = \$3,031,200  5 Year Community Impact Salaries = \$35,675,000  Total Expense = \$2,891,000</p> <p>Direct ROI = 4.85%  Indirect ROI = 1134%  Total ROI = 1238.85%</p> <p>Indirect and Total ROI represent the net tangible economic impact that we can achieve in the region with this project.</p>
	<b>Annual sales or other non-tax revenue generated (\$)</b>	\$606,240.00
	<b>Description of annual sales or other non-tax revenue generated</b>	<p>There are two annual revenue sources.</p> <ol style="list-style-type: none"> <li>1) Tuition.</li> <li>2) Revenue from internship placements.</li> </ol>
	<b>Jobs created (if applicable)</b>	280
	<b>Description of jobs created (if applicable)</b>	The jobs that will be created are web development and technology focused. The employees that will be trained and hired is projected at an 80% success rate of the class. Also included are a few jobs created to run the program (instructors and administration).



## Project #7 Project Lead the Way in Marshall County

Project Information		
Business & Experience	<b>Project Contact</b>	Linda Yoder
	<b>Project Description</b>	Title: Project Lead the Way  This project seeks to support the implementation of Project Lead The Way's world class STEM curriculum in all public and private K-12 schools in Elkhart, Marshall, and St Joseph Counties. Project Lead the Way provides STEM curriculum for the practical study of Science, Technology, Engineering, and Math in grades K-12, incorporating hands-on learning, group work, problem solving and collaboration. These are all skills employers are looking for in the current workforce.
	<b>Project Location</b>	This project will be located in public and private schools of Elkhart, Marshall and St. Joseph Counties including schools located in the cities/towns of Elkhart, Goshen, Nappanee, Bristol, Dunlap, Middlebury, Millersburg, New Paris, Simonton Lake, and Wakarusa in Elkhart County; Argos, Culver, Bourbon, Bremen, LaPaz and Plymouth in Marshall County; Mishawaka, South Bend, Indian Village, Lakeville, New Carlisle, North Liberty, Osceola, Roseland, and Walkerton in St. Joseph County.
	<b>Project Category</b>	Education and incumbent workforce
	<b>Industry Alignment</b>	Primarily manufacturing and healthcare, scientific and technical workforce
	<b>Project Partners</b>	Partners invested in the implementation of this plan are: Nonprofit organizations such as Community Foundations and United Way in each county, Economic development organizations as well as city, town and county governments, the Chamber of Commerce in each community, all K-12 public and private schools in the three counties, private sector partnerships (independent businesses and organizations), Project Lead The Way (based in Indianapolis)



Project Ownership, Partners (Project Type & Readiness)	Project Experience	Talent Roadmap for Northern Indiana, a 2012 study commissioned by Corporate Partnership for Economic Growth (CPEG) and conducted by Thomas P Miller and Associates. In demand occupations for the region include the manufacturing industry which employs the largest number of individuals, more than 92,800, which is over one-fourth of the total employment available in the region. Northern Indiana's healthcare industry claims the greatest projected growth potential and second highest regional employment figures with over 38,100 jobs (2012). An additional 8,600 jobs are expected to be added by 2022. Opportunities in these strong target industries require at least a postsecondary credential and not just a high school diploma. In addition, many of these positions also require a STEM-related skillset and soft skills. These findings emphasize the importance for higher educational attainment for in-demand occupations in Northern Indiana. Five counties in the Northern Indiana region (Elkhart, Fulton, Kosciusko, Marshall and St. Joseph) were selected for a pilot project to leverage \$4.4 million in match funding to offset three-year start up costs for every public and private school to implement PLTW curriculum at every grade level. Prior to this initiative, there were 26 implementations of PLTW curriculum in the region and the region was losing business expansion and attraction opportunities because the concentration of STEM curriculum in schools was not high enough. During the first year of implementation (2014-15), 43 new implementations were added and projections for 2015-16 include an additional 40 for a total of 109 of 409 potential implementations. While Phase 1 of this project has had significant success in early stages, barriers remain due to 1) significant costs for some schools to upgrade technology and classroom space to meet minimum PLTW prerequisites, 2) demand from students for additional classes and the necessity to share equipment and other resources, and 3) limited funding in Phase 1 for more than basic equipment to further spark the imagination of students. This application focuses on funding for Phase 2 to help ensure that all classes in the PLTW program strands (Launch at the elementary level, Gateway for middle school grades, and Engineering, Biomedical Sciences, and Computer Science at the high school level) can be fully implemented in all schools by providing necessary prerequisite and specialized equipment to totally engage students in this unique learning environment. Phase 3
Project Timeline	Project Start Date	Phase 2: 9/1/2015 (Phase 1 began 3/1/2014)
	Project End Date	7/31/2017
	Start within 12 months?	Yes
	Project Timeline	<p>Training for each of the Project Lead the Way classes is held each summer. The classes are then implemented in the school year (August through May). In the early spring (March) schools survey students regarding interest in classes and then make decisions in which classes should be added next. Teachers then are chosen for the new classes and these teachers train in the summer which starts the cycle over again.</p> <p>Once all of the classes have been implemented in each of the pathways offered by Project Lead the Way (Launch, Gateway, Engineering, Biomedical Sciences, Computer Science) then textbook fees and vocational funding from the State of Indiana can maintain the programs (as current funding stands.)</p>
	Year 1 capital expenditures (\$)	\$1,071,233.00
	Year 2 capital expenditures (\$)	\$1,281,235.00
	Year 3 capital expenditures (\$)	\$1,176,238.70



### Project Budget & Funding

<b>Year 4 capital expenditures (\$)</b>	\$315,000.00
<b>Year 5 capital expenditures (\$)</b>	\$72,636.00
<b>Total Capital Expenditures</b>	\$3,916,342.70
<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$2,565,247.30
<b>Total project budget</b>	\$6,481,590.00
<b>Description of Capital Expenditures</b>	Phase 1 of the project pays for the summer teacher training, Project Lead the Way curriculum fees for each class offered at each school, and a few basic supplies related to specific curriculum. Phase 2 (the focus of this application) is required for prerequisite upgrades to technology (including computers, ipads, printers, etc.) and classroom space as necessary for application to PLTW and additional equipment and resources not included in Phase 1 that increase exponentially the student learning experience. This amount varies from \$5,000-\$20,000 per classroom. Once everything is in place, ongoing costs are minimal and can be managed within available resources.
<b>Description of Ongoing Expenditures</b>	Annual fees to Project Lead the Way for each class offered at each school Teacher salaries for the staff teaching the program Consumable supplies Technology (computers, IPADS, etc.) for implementing program.
<b>Local public funding</b>	\$1,805,442.00
<b>Private funding</b>	\$1,899,459.00
<b>Non-profit funding</b>	\$1,989,495.00
<b>Other funding</b>	\$0.00
<b>State funding required?</b>	Yes
<b>State funding needed</b>	\$787,194.00
<b>State funding proportion of cap ex</b>	20%
<b>Total private funds</b>	\$3,888,954.00
<b>Private ratio calc</b>	60
<b>Total public funds</b>	\$2,592,636.00
<b>Public ratio calc</b>	40
<b>Other</b>	\$0.00
<b>Other ratio calc</b>	0
<b>Total funding</b>	\$6,481,590.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	60 / 40 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	Economic development groups across the region have identified lower educational attainment rates as systemic of a more significant challenge - supplying talent for in-demand occupations. Implementing STEM, Project Based Learning and CTE (Career and Technical Education) that aligns with the needs of business is critical to providing a pipeline of workers ready and able to fill current and future demand. This project aligns with the Northern Indiana Talent Roadmap, the plan developed by the Corporate Partnership for Economic Growth with support from the Economic Development Corporation of Elkhart County, the Fulton Economic Development Corporation, the Kosciusko Economic Development Corporation, the Marshall County Economic Development Corporation and The Chamber of Commerce of St. Joseph County.
	<b>Anticipated return on investment (%)</b>	100
	<b>Description of anticipated return on investment</b>	partners have conducted extensive research on the success of the curriculum and have concluded that 70% of high school seniors who are taking PLTW courses intend to study engineering, technology, computer science or another applied science. Over 93% of PLTW students intend to pursue at least a two-year or four-year degree after high school. PLTW graduating seniors believe taking PLTW classes has "significantly increased their ability to succeed in college." Examples from a survey of 56,000 Indiana high school graduates includes the following findings: 1) High school graduates who participated in PLTW were nearly three times as likely to major in STEM versus non-PLTW graduates 2) Students who took three or more PLTW courses while in high school were six times more likely to study STEM in college than their peers who had not taken PLTW while in high school and 3) PLTW participation was significantly related to persistence into the second year of college, especially for those students who had taken three or more PLTW courses. Locally response after the first year of implementation includes these comments from teachers: "I was walking a local business person through an Introduction to Engineering Design class who was amazed to see our 9th and 10th graders working in the software very similar to what his employees use" and another teacher noted that "the biomedical program introduces over 100 different professions and, with these introductions, students become interested in a career. Our community has, in addition to hospitals, the orthopedic industry and a future nanotechnology industrial park." One student told her teacher, "I didn't realize all the different jobs in medical science. I told my mom about all of my choices for a job and now she wants to go back to school!" It is expected that student results for the Northern Indiana Regional PLTW Initiative will start to become most evident over the next 1-3 years following the successful implementation of PLTW. More immediate results may be noted by expansion of existing and attraction of new business due to higher concentration of STEM curriculum. Expected outcomes, long term, are an increase in student achievement and resulting increase in earning potential, a reduction in unemployment rate due to more qualified workforce, and an increase in business activity, all of which will result in a stronger economy, stronger schools and a continuation of a cycle for more vibrant communities.
	<b>Annual sales or other non-tax revenue generated (\$)</b>	0
	<b>Description of annual sales or other non-tax revenue generated</b>	Long term, increases in revenue will come from a more skilled work force earning better wages and investing more in their local communities because of their increased spending power. The anticipated increase in industry and the number of jobs should generate more revenue for these local communities.
	<b>Jobs created (if applicable)</b>	There were 2,080 open positions in the region in 2012 with a heavy concentration of openings in the manufacturing industry. An additional 8,600 jobs are expected to be added in the healthcare industry by 2022. From 2012 to 2022 there is a projected increase of over 1,100 jobs available within STEM careers.
	<b>Description of jobs created (if applicable)</b>	Jobs will be created and filled in manufacturing and healthcare industries and other scientific and technical positions.



## Project #8 Education Alliance of St. Joseph County

Project Information	
<b>Project Contact</b>	Kate Lee
<b>Project Description</b>	St. Joseph County Education Alliance: To ensure a high quality short and long-term pipeline of talent, St. Joseph County will work to develop a comprehensive cradle-to-career ecosystem that connects pre-K, K-12, post-secondary and career growth and transition programs to ensure positive impact and outcomes for individuals, businesses and our overall economy. Utilizing the collective impact model, we have begun work on this project by beginning to document the current landscape at each level - pre-K through career growth - to illustrate what currently exists and where collaborations are taking place or could be beneficial. We will work to reduce duplication and the creation of programs with minimal impact relative to the investment of human and funding capital. Key to the success of our effort will be establishing a model that is transparent, community-driven and sustainable.
<b>Project Location</b>	St. Joseph County
<b>Project Category</b>	Education and incumbent workforce
<b>Industry Alignment</b>	0
<b>Project Partners</b>	Currently, the establishment of the Alliance is being led by Larry Garatoni, Garatoni Family Foundation/Founder of South Bend Career Academy and the St. Joseph County Chamber of Commerce. Others who will play key roles as partners and sponsors of the core alliance include: United Way of St. Joseph County; all county school corporations; City of South Bend; City of Mishawaka; Council representatives from South Bend and Mishawaka; charter school representative; Catholic schools representative; Ivy Tech North Central Region; Indiana University South Bend and business/employer representative(s). Other key partners who will be engaged in the work of the Alliance, through work groups and special projects, include: University of Notre Dame, Holy Cross College, Purdue South Bend, Saint Mary's College, Bethel College, WorkOne, Early Childhood Coalition of St. Joseph County, Region 2 Works Council and Michiana Science & Technology Center. Additional partners will be engaged as the Alliance builds its infrastructure and begins implementation of focused projects. In addition, the most efficient and effective staffing model and structure is to be determined.
<b>Project Experience</b>	Three members of the pre-planning project team attended a StriveTogether convening in March to learn more about the collective impact model for education. There are more than 60 communities across the country currently implementing the Strive model. In addition, there are a number of additional collective impact/coalition building models, including those in Columbus and Elkhart, IN. Many resources for best practices and examples of successful education alliances are available to guide our work as we establish our Education Alliance.

<b>Project Timeline</b>	<b>Project Start Date</b>	7/1/2015
	<b>Project End Date</b>	7/1/2017
	<b>Start within 12 months?</b>	Yes
	<b>Project Timeline</b>	Within the first year of the project, the backbone structure would be established. This would include creating a staffing model; establishment of an advisory board; determining baseline data, goals and data collection tools/processes; selecting key indicators of success; and engaging the larger community. By the end of year two, focused, collaborative work groups would be established around the overall Alliance goals and indicators to improve communication and educational outcomes.

<b>Year 1 capital expenditures (\$)</b>	\$0.00
<b>Year 2 capital expenditures (\$)</b>	\$0.00
<b>Year 3 capital expenditures (\$)</b>	\$0.00
<b>Year 4 capital expenditures (\$)</b>	\$0.00



Project Budget & Funding	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$0.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$600,000.00
	Total project budget	\$600,000.00
	Description of Capital Expenditures	No capital expenditures expected.
	Description of Ongoing Expenditures	Expenditures are an estimate, based on projected staffing and operations expenses. Ongoing expenditures will be determined as the staffing model is built and community needs are identified.
	Local public funding	\$100,000.00
	Private funding	\$400,000.00
	Non-profit funding	\$100,000.00
	Other funding	\$0.00
	State funding required?	No
	State funding needed	\$0.00
	State funding proportion of cap ex	0%
	Total private funds	\$500,000.00
	Private ratio calc	83
	Total public funds	\$100,000.00
	Public ratio calc	17
	Other	\$0.00
	Other ratio calc	0
	Total funding	\$600,000.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	83 / 17 / 0

Project Impact	Project impact and alignment with local or regional plans	Throughout our state and region it is widely acknowledged that some level of post-secondary training is required for the high-demand, high-wage jobs we hope to grow in our area. It's important that we participate in ensuring that children within our K-12 education system are building the foundation necessary to graduate and take the next step, from direct employment and apprenticeships to technical training and advanced degrees. Education outcomes and the current skill level of our workforce need to be improved to realize the maximum economic potential of our region. Plans outlining the workforce and education needs in our state and region are abundant - WorkOne, the Commission for Higher Education, the Indiana Chamber, Conexus, Indiana Career Council - just to name a few - have all compiled research and reports detailing workforce issues and needs.
	Anticipated return on investment (%)	0
	Description of anticipated return on investment	ROI will be measured in improved educational outcomes and a stronger, more prepared workforce.
	Annual sales or other non-tax revenue generated (\$)	0
	Description of annual sales or other non-tax revenue generated	2.5
	Jobs created (if applicable)	2
	Description of jobs created (if applicable)	To be determined - data management role will be necessary



## Project #9 - ETHOS Science Center

Leadership, Partners & Experience Project Type & Readiness)	Project Information	
	Project Contact	Patsy Boehler
	Project Description	ETHOS Science Center, a not-for-profit established in 2001, offers a variety of hands-on STEM programming for both students and teachers. At present, programming is offered from a rented facility in Elkhart. This former IVY Tech's size and configuration is inadequate to house ETHOS' rapidly growing programs and activities however, including its much in-demand robotics programming. As a result, ETHOS plans to move into its own facility, and is in conversation with the Bayer Corporation regarding its former property on North Michigan Avenue in Elkhart. After it is donated to ETHOS, this facility will require approximately \$ 2,661,625 in renovations to render it suitable for ETHOS activities however. The focus of ETHOS involvement in the RCNI will be the building on North Michigan, transforming it into a facility that is adequate for ETHOS to serve as the regional provider of STEM programming, with particular emphasis placed on expanding its K-12 robotics programming.
	Project Location	ETHOS is presently located at 2521 Industrial Parkway in Elkhart, Indiana (Elkhart County). The Bayer Corporation property, which will become ETHOS new Science Center, is located at 1025 North Michigan Avenue in Elkhart (see attached property description). Most all of ETHOS programming emanates from its Science Center. Much robotics activity is also offered from ETHOS' facility. ETHOS sponsors its own robotics teams, which work from ETHOS' Science Center. Much of the training for regional team coaches and mentors also occurs at ETHOS. At present, robotics programming is also offered to students in schools in all seven of Elkhart County's public school districts, to students in home school settings and other alternative education locations, and in other-than-school settings such as the four Boys & Girls Clubs in Elkhart County. Robotics instruction is also available to certain students in the Penn Harris Madison Schools in St. Joseph County.  Via this initiative, ETHOS will vastly expand the breadth of its STEM programming – including robotics - to include additional schools, home school networks and providers of other-than-school day education services throughout the region.
	Project Category	Education and incumbent workforce
	Industry Alignment	Via their participation in STEM programming, students acquire many skills and behaviors required by employees in any industry. They learn to think critically, to analyze information, to plan, to revise said plans due to unforeseen circumstances, to communicate effectively, to resolve conflict, and to function as a contributing member of a team. Specifically, the technical skills (design, construction, programming and operation) acquired via robotics participation are fully aligned with the demands placed on employees in today's advanced manufacturing environments.



Project Owni (Project Type & Realities)	<b>Project Partners</b>	Partnering organizations expected to play important roles in the expansion of its STEM programming once ETHOS relocates to its own new facility include public school corporations in each of the participating regional counties. Also included and playing significant supporting roles will be the regional business community, whose financial investment is crucial to ETHOS continued expansion. Other partners include the providers of other-than-school-day youth services, including such organizations as Boys & Girls Clubs, community centers and other providers of non-school youth development programming. The region is also home to a growing association of home schoolers, who will also become engaged.
	<b>Project Experience</b>	<p>programming. This expertise will be drawn upon to expand its many initiatives throughout the region. Briefly, STEM programming offered includes:</p> <ul style="list-style-type: none"> <li>• ETHOS Science Center is a hands-on science museum, hosting numerous field trips each year,</li> <li>• Sneak Peek Science is held during the evening monthly and affords entire families opportunities to experience science,</li> <li>• ETHOS provides curriculum-aligned science teaching kits to classroom teachers, with each containing all of the equipment and supplies needed to supplement textbook instruction,</li> <li>• ETHOS operates its state-of-the-art mobile science lab, the Science2Go Bus, which appears at schools and other community events nearly 300 times per year,</li> <li>• ETHOS also provides professional development opportunities for science teachers throughout the year, assisting each to become more confident and competent to teach science.</li> </ul> <p>Here, we add additional detail regarding ETHOS robotics programming. Presently, robotics teams are active in schools throughout Elkhart County. Hundreds of students participate in one of four competitive levels ranging from very simple LEGO devices built by young, entry-level “roboteers,” to highly complex, metal fabricated machines weighing as much as 120 lbs which are built and programmed by high schoolers. ETHOS initially trains team coaches, providing them with the technical expertise to offer meaningful robotics programming, as well as offering on-going technical assistance to these mentors. ETHOS also provides state-of-the art robotics equipment via its rental program, and sponsors a number of tournaments throughout the year, enabling robotics teams to practice and to display their expertise via competitions with other teams.</p> <p>Robotics Numbers...</p> <ul style="list-style-type: none"> <li>• ETHOS has assisted 116 robotics teams in various ways and degrees</li> <li>• Presently, approximately 850 area students are participating in 1 of the 4 competition levels</li> <li>• Nearly 230 adults coach/mentor the teams referenced above</li> </ul>
Project Timeline	<b>Project Start Date</b>	August, 2015
	<b>Project End Date</b>	June, 2017
	<b>Start within 12 months?</b>	Yes
	<b>Project Timeline</b>	ETHOS anticipates that conversations with Bayer Corporation will successfully conclude during the late summer, 2015, with the property being donated. ETHOS will immediately meet with representatives of Ancon Construction to launch the building construction/renovation stage of the project. It is not possible to project precisely when the building will be completed and ready for ETHOS occupancy. We hope that we will be able to begin programming from our new Science Center during the late Spring/early summer of 2016.



Project Budget & Funding	Year 1 capital expenditures (\$)	\$3,636,625.00
	Year 2 capital expenditures (\$)	\$0.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total cap ex	\$3,636,625.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$0.00
	Total project budget	\$3,636,625.00
	Capital Expenditures	Considerable work is required to render the Bayer property suitable for use by ETHOS as its Science Center. The building's market price is \$975,000. Estimates for work to be completed total \$ 2,661,625 and include: \$ 464,625 for the construction of a new warehouse; \$ 1,361,000 for various renovations on the building's 1st floor; \$ 636,000 for 2nd floor renovations; and \$ 200,000 for a new boiler.
	Ongoing Expenditures	ETHOS annual operating budget is approximately \$ 675,000 per year. This is anticipated to increase as programs expand. Ongoing operational costs include those related to personnel, materials/supplies, equipment and administrative
	Local public funding	\$532,325.00
	Private funding	\$2,571,975.00
	Non-profit funding	\$0.00
	Other funding	\$0.00
	RCI funding required?	Yes
	RCI funding needed	\$532,325.00
	RCI funding proportion of cap ex	15%
	Total private funds	\$2,571,975.00
	Private ratio calc	71
	Total public funds	\$1,064,650.00
	Public ratio calc	29
	Other	\$0.00
	Other ratio calc	0
	Total funding	\$3,636,625.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	71 / 29 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	For a number of years in Indiana, the teaching of science has been de-emphasized. This is particularly true at the elementary school level. Why? This situation exists because today, much emphasis is placed on standardized test performance and students are tested in the areas of reading/language arts and math. Hence, much classroom instruction focuses in these areas, at the expense of other important subjects. School funding, teacher pay, school and teacher reputations, etc. are closely tied today with students demonstrating proficiency in these two, admittedly important subject areas. Increasingly however, our business community is saying that it must have more technologically competent employees. Employers must have access to a pool of employees who not only possess increasingly complex technical skills, but also to those who know how to think critically. Science teaching generally – and robotics participation specifically - imparts these critically important skills!
	<b>Anticipated return on investment (%)</b>	0
	<b>Description of anticipated return on investment</b>	Youth who participate in ETHOS STEM programming generally and in robotics specifically acquire much needed technical knowledge and skills which are critical to regional employers today and into the future. Additionally, students acquire other important knowledge and behaviors including the ability to question and to think critically, to analyze information received, to plan and to then adjust the plan due to unforeseen developments, to communicate effectively, to resolve conflict productively, to contribute to team effort, etc.
	<b>Annual sales or other non-tax revenue generated (\$)</b>	0
	<b>Description of annual sales or other non-tax revenue generated</b>	Not applicable
	<b>Jobs created (if applicable)</b>	0
	<b>Description of jobs created (if applicable)</b>	Not applicable



## Project #10 - Metronet Extension

Project Information - This application combines the Marshall County and Elkhart County Metronet	
Project Ownership, Partners & Experience (Project Type & Readiness)	<b>Project Contacts</b>
	a.) Mary Jan Hedman, CEO, St. Joe Valley Metronet and Barkley Garrett, Director of Economic Development at the City of Elkhart b.) Jerry Chavez, Executive Director of the Marshall County EDC
	<b>Project Description</b>
	This project involves the construction of dark fiber with greatly enhanced bandwidth capabilities in both Elkhart and Marshall County. a.) The expansion of the Metronet fiber into Elkhart involves combining existing fiber networks with new conduit and fiber connecting with St. Joseph County. The project would expand the availability of powerful and cost-effective broadband services for many regional businesses and support economic growth as a powerful community asset. b.) This project would bring Metronet broadband services to the remaining incorporated areas of Marshall County as well as one of the county's largest employers and only post secondary school. In addition to the Metronet expansion, this project would support the establishment of entrepreneurship/incubator centers in Plymouth and Culver.
	<b>Project Location</b>
	a.) The Metronet expansion into Elkhart County includes the build of conduit and fiber bringing increased broadband capabilities in both the City of Elkhart and City of Goshen. b.) The Metronet expansion would involve bringing fiber optic broadband capabilities allowing unlimited bandwidth to the towns of Culver, Bourbon, Argos, and Bremen as well as Ancilla College and Culver Academies in unincorporated Marshall County. Plymouth, LaPaz and Lakeville were connected to the Metronet in 2014 thru a public/private partnership where two counties, a city, and two private businesses paid for the construction of 17 miles of infrastructure. To date, Metronet has allowed Hoosier Racing Tire, St. Joseph Regional Medical Center and several other organizations to operate with increased data transfer efficiencies offering better services to their clients.
	<b>Project Category</b>
	Infrastructure
	<b>Industry Alignment</b>
	a.) Since high-speed connectivity is essential to all businesses, healthcare organizations, governmental agencies, financial institutions, K12 and high education institutions, the project will allow organizations in any industry to more efficiently achieve their missions through reduced costs and increased technology capabilities b.) The project will specifically benefit high tech businesses that rely on efficient and dependable data transmissions. Furthermore, Metronet will provide all private and public organizations with unlimited broadband services in a rural county setting.
	<b>Project Partners</b>
	a.) City of Elkhart, City of Goshen, Elkhart County Economic Development Corporation, Elkhart County Regional Higher Education Institutions, Private businesses and Non-profit entities b.) City of Plymouth, Plymouth Redevelopment, Town of Culver, Culver Redevelopment Commission, Marshall County, Ancilla College, Culver Academies, Town of Bourbon, Bourbon Redevelopment, Town of Bremen, Bremen Redevelopment, Marshall County Economic Development Corporation, Metronet, Indiana Small Business Development Center, Private sector
	<b>Project Experience</b>
	Metronet currently provides fiber connectivity to 190 subscribers in both St. Joseph and Marshall Counties. b.) City of Plymouth and Marshall County recently completed a similar project to bring Metronet's dark fiber to Plymouth from South Bend. This project was originally funded by Marshall and St. Joseph Counties, City of Plymouth, St. Joseph Regional Medical Center, and Hoosier Racing Tire for the benefit of businesses of Marshall County.
<b>Project Start Date</b>	
9/1/2015	
<b>Project End Date</b>	
7/30/2017	
<b>Start within 12 months?</b>	
Yes	



<b>Project Timeline</b>	<p>a.) The Elkhart County Metronet project will commence immediately and include the following: 1.) Invite feedback from Project Partners, 2.) Conduct an Engineering and Market Study, 3.) Decide on final route and expansion plan, 4.) Explore capital contributors, 5.) Develop the RFP, 6.) Install conduit to house fiber, 7.) Install fiber through conduit, and 8.) Connect organizations b.) The project schedule includes the following: 1.) Market project to businesses or organizations that may benefit from Metronet (as was done in the first Metronet project), 2.) Plan the extension route to the communities including the towns of Culver, Bourbon, Argos, and Bremen, and Ancilla College, 3.) Plan the route within the individual communities, 4.) Develop engineering plans and obtain necessary permits, 5.) Explore capital contributors, 6.) Develop RFP, 7.) Install conduit to house fiber. 8.) Install fiber through conduit, 9.) Connect organizations.</p>
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<b>Year 1 capital expenditures (\$)</b>	\$11,271,605.00
<b>Year 2 capital expenditures (\$)</b>	\$0.00
<b>Year 3 capital expenditures (\$)</b>	\$0.00
<b>Year 4 capital expenditures (\$)</b>	\$0.00
<b>Year 5 capital expenditures (\$)</b>	\$0.00
<b>Total Capital Expenditures</b>	\$11,271,605.00
<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$0.00
<b>Total project budget</b>	\$11,271,605.00
<b>Description of Capital Expenditures</b>	All capital expenditures for both a + b will occur within the first 2 years of the project, and will include: 1.) Design and engineering, 2.) Permitting fees, 3.) Installation of the conduit and all associated infrastructure (i.e. handholds), 4.) Installation of the fiber through the conduit, 5.) Splicing and interconnections with existing fiber networks.
<b>Description of Ongoing Expenditures</b>	None. As this is a broadband infrastructure project, post-construction maintenance cost will be incurred by the Metronet and covered by ongoing annual subscription revenue.
<b>Local public funding</b>	\$2,254,321.00
<b>Private funding</b>	\$6,762,963.00
<b>Non-profit funding</b>	\$0.00
<b>Other funding</b>	\$0.00
<b>State funding required?</b>	Yes
<b>State funding needed</b>	\$2,254,321.00
<b>State funding proportion of cap ex</b>	20%
<b>Total private funds</b>	\$6,762,963.00
<b>Private ratio calc</b>	60
<b>Total public funds</b>	\$4,508,642.00
<b>Public ratio calc</b>	40
<b>Other</b>	\$0.00
<b>Other ratio calc</b>	0
<b>Total funding</b>	\$11,271,605.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	60/40/0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	b.) This project has been identified in the Town of Culver's comprehensive plan in 2014, Marshall County EDC's Strategic Plan adopted in 2014, and by Marshall County government. By increasing high speed dark fiber capabilities, MCEDC believes it will be able to cultivate and incubate the entrepreneurial spirit in Marshall County and leverage business connections through the many corporate level executives living in the Plymouth and Culver areas. By developing a more robust infrastructure foundation, Marshall County will be in an advantageous position to establish entrepreneurial development support with the University of Notre Dame, Purdue University, Indiana University, and Rose Hulman.
	<b>Anticipated return on investment (%)</b>	166%
	<b>Description of anticipated return on investment</b>	Approximately, \$30,000,000 in additional new capital investment, increased productivity and cost savings are expected over the first 10 years as a result of this project. This estimate includes investment through business expansions resulting from new available technologies, and increased broadband capacities and speeds, previously unavailable in Marshall County and Elkhart County. The anticipated ROI is through additional capital investment, and an estimate of \$2,000/month/subscriber in cost savings and increased productivity. The ROI in terms of payroll or other benefits has not been determined.
	<b>Annual sales or other non-tax revenue generated (\$)</b>	\$ 430,800.00
	<b>Description of annual sales or other non-tax revenue generated</b>	To be concretely determined in the engineering and market analysis phase of the project. Estimations towards annual subscription fees are calculated based upon subscriber numbers in year three leveraging currently known viable candidates. The annual sales and revenue generated through the project will be dependent upon the number of subscribers that utilize the new broadband infrastructure. We expect the annual subscriptions to increase annually. Per prior discussions with local businesses, there is a demand for additional broadband services in order to increase speeds and capacity. When the Metronet was extended to and throughout Plymouth, there were approximately 20 businesses and a number of public agencies that signed on within the first 3 months to benefit from the project. The increase in annual sales will result from increased operational efficiencies for local businesses and other subscribers.
	<b>Jobs created (if applicable)</b>	0
	<b>Description of jobs created (if applicable)</b>	a.) As a result of better connectivity and performance, new companies will be more willing locate in the area, and this has been evidenced by several companies in St. Joseph County. In addition, new capabilities unlocked by local businesses will allow for greater expansion of services, e.g. new jobs being created. b.) To be determined. However, the technology is key to creating the 200 jobs expected through the entrepreneurship center/ business incubator project and does not account to existing businesses such as Hoosier Racing Tire and their expected job growth due to Metronet advantages. The project will allow for businesses to expand their operations, and will be utilized to attract new businesses that require unlimited capacity broadband infrastructure.



## Project #11 - Entrepreneurship Center/Business Incubator

Project Ownership, Partners & Experience (Project Type & Readiness)	<b>Project Information</b>	
	<b>Project Contact</b>	Jerry Chavez, MCEDC Executive Director
	<b>Project Description</b>	Marshall County Entrepreneurship Center / Business Incubator is a strategic plan to establish two centers, one in the City of Plymouth, and one in the Town of Culver. Both centers will utilize dark fiber as a business advantage with the goal of cultivating the entrepreneurial spirit and opportunities, and leveraging an educational platform with Indiana universities and secondary education providers.
	<b>Project Location</b>	1). Old Downtown Fire Station, 220 N. Center Street, Plymouth, IN 46563, Marshall County 2). Uptown Culver, Location to be determined, Marshall County
	<b>Project Category</b>	Innovation and technology
	<b>Industry Alignment</b>	High Tech and Innovation
	<b>Project Partners</b>	Steering committees; Local college (Ancilla College); Town of Culver/Culver Redevelopment Commission; Marshall County Community Foundation; Marshall County Economic Development Corporation; ISBDC, IEDC, Elevate Ventures; Angel Investors/VCs; National Business Incubator Association (NBIA)
Project Timeline	<b>Project Experience</b>	The MCEDC Executive Director has assisted in building an incubator in Flagstaff, AZ. Also, he has teamed with North Dakota Universities to bring a medical center and college of engineering department to Minot, ND, for the development of new technology for medical devices. He also has experience with 4 Department of Defense projects, and extensive background with other technology based initiatives.
	<b>Project Start Date</b>	1/1/2015
	<b>Project End Date</b>	12/31/2016
	<b>Start within 12 months?</b>	Yes
	<b>Project Timeline</b>	Already started with the formation of committees in Plymouth and Culver. End date of 12-18 months is when we expect to have the first incubator tenant in each location. Planning team assembled in both communities with specific action items and dates being discussed to include: 1.) Development of angel network. 2.) Development of entrepreneur mentor board.



Project Budget & Funding	Year 1 capital expenditures (\$)	\$4,000,000.00
	Year 2 capital expenditures (\$)	\$1,000,000.00
	Year 3 capital expenditures (\$)	\$1,000,000.00
	Year 4 capital expenditures (\$)	\$1,000,000.00
	Year 5 capital expenditures (\$)	\$1,000,000.00
	Total Capital Expenditures	\$8,000,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$460,000.00
	Total project budget	\$8,460,000.00
	Description of Capital Expenditures	Plymouth= continued rehab of old fire station, program funding needed for incubator, establish attraction incentives and graduation grants. Year 1 = \$2.0M; Year 2-5 = \$1.0M Culver= build incubator space once momentum is achieved, program funding needed for incubator, establish attraction incentives and graduation grants. Year 1 = \$2.0M; Year 2-5 = \$1.0M
	Description of Ongoing Expenditures	1-2 YR= \$90,000; 3-4 YR= \$110,000; 5 YR = \$90,000; 6 YR+= \$60,000; all operating costs are for each location. Salaries, benefits, rent, computer, maintenance, travel, phone, insurance, professional development, supplies, etc.
	Local public funding	\$1,600,000.00
	Private funding	\$4,800,000.00
	Non-profit funding	\$460,000.00
	Other funding	
	RCI funding required?	Yes
	RCI funding needed	\$1,600,000.00
	RCI funding proportion of cap ex	20%
	Total private funds	\$5,260,000.00
	Private ratio calc	62
	Total public funds	\$3,200,000.00
	Public ratio calc	38
	Other	\$0.00
	Other ratio calc	0
	Total funding	\$8,460,000.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	62 / 38 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>Diversification of economy; Job creation and growth; Talent retention and attraction; Technological advancement; Direct and indirect spending</p> <p>Identified as one of the top 3 priorities for Culver. Project is in the planning stage, and they will be working on this in the near future whether the regional grant funding is available or not.</p> <p>Marshall County EDC Strategic Plan, Committee is being organized to include private and public sector partners.</p> <p>This initiative leverages unlimited bandwidth broadband infrastructure provided by another public/private partnership through the Metronet.</p>
	<b>Anticipated return on investment (%)</b>	400
	<b>Description of anticipated return on investment</b>	Look to the National Business Incubator Association (see above for project partners) for potential economic multipliers.
	<b>Annual sales or other non-tax revenue generated (\$)</b>	0
	<b>Description of annual sales or other non-tax revenue generated</b>	TBD
	<b>Jobs created (if applicable)</b>	200
	<b>Description of jobs created (if applicable)</b>	200 technology positions due to multiple business types and technologies. Examples include: nanotechnology, data mining, and other forms of technology that require use of enhanced (unlimited) broadband bandwidth.



## Project # 12 - Bethel College Free Enterprise Center

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Ed Bernhard Senior Director, Facilities/Auxiliary Services
	Project Description	<p>Bethel College Free Enterprise Center</p> <p>The Free Enterprise Center serves as the “front door” for visitors to Bethel College. These visitors come to the campus as prospective students and families and as visitors for conferencing events. Many also come to the Center to benefit from its services and programing for professional and academic business development.</p> <p>The Enterprise Center will add 4,000 square feet of dedicated conferencing space to Bethel's current available space. It will house the college's academic business department and provide dedicated space to serve the community as a business incubator. It will be an addition directly connected to the current dining facility. The addition of conferencing space in this location will enhance efficiencies for catering in this new facility and other spaces on campus. Approximately 4,500 square-feet will house the business incubator space. To maximize the effective interactions between the local business community and Bethel's own academic pursuits in business, the college will move the school's business department to the Center. Bethel's Center for Corporate and Customized Training initiative will be housed in the new facility and expand its services. Additionally, given the Center's central campus location and its role as the “front door” for many visiting the college, the Bethel College Admission Office will also be located here.</p>
	Project Location	Bethel College 1001 Bethel Circle Mishawaka, IN St. Joseph County
	Project Category	Infrastructure
	Industry Alignment	Conferencing is the primary industry supported by this project. In addition, the Center will provide physical and technology space for start-ups and entrepreneurs, as well as expanded opportunities for professional development and customized training services to the local business community.
	Project Partners	<p>An unofficial partner of the Free Enterprise/Conference Center is the South Bend/Mishawaka Convention and Visitors Bureau (CVB). Bethel is an active member and partner of the CVB.</p> <p>Currently, the college is in the final stages of securing a grant from a foundation excited to facilitate the business incubator and revenue producing conferencing opportunities. The Missouri-based foundation requires that their name not be listed until grant documents are prepared and signed. The final on-site visit is being scheduled and Bethel is confident of seven figure funding.</p>
	Project Experience	<p>Bethel College has staffed a full-time conference service office for 10 years and has been a sales partner with the South Bend/Mishawaka Convention and Visitors Bureau during this entire period. The college has the staff, experience and the local relationships to maximize the benefit of expanded conferencing space.</p> <p>The college, its senior administration, and Director of Auxiliary Services have extensive experience coordinating college construction projects. Major construction projects are part of the ongoing activity of a college or university campus and bring a high level of experience and confidence when embarking on new construction.</p>
Project Timeline	Project Start Date	7/1/2016
	Project End Date	9/30/2017
	Start within 12 months?	Yes
	Project Timeline	<p>July 2016 - Final building plans, space and programming allocations, and esthetic decisions completed</p> <p>September 2016 – Architectural design and construction prints completed with project out for bid</p> <p>October 2016 – Site work begins</p> <p>November 2016 – Construction begins</p> <p>July 2017 – Finish work begins</p> <p>September 2017 – Fixtures installed</p>



Project Budget & Funding	Year 1 capital expenditures (\$)	\$2,500,000.00
	Year 2 capital expenditures (\$)	\$4,500,000.00
	Year 3 capital expenditures (\$)	\$40,000.00
	Year 4 capital expenditures (\$)	\$40,000.00
	Year 5 capital expenditures (\$)	\$40,000.00
	Total Capital Expenditures	\$7,120,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$159,200.00
	Total project budget	\$7,279,200.00
	Description of Capital Expenditures	Design and contracting consultant estimates cash outlays for year one at \$2.5 million. This includes design, earthwork and partial concrete costs. Design and contracting consultant estimate cash outlays for year two at \$4.5million. The balance of construction costs incurred include concrete, rough and finish construction, landscaping, equipment and fixtures.
	Description of Ongoing Expenditures	The first year's operating expenses are estimated at \$159,200. This total includes professional and staff salaries, marketing and related expenses, institutional memberships and professional development, service expenses and working capital, utilities and repairs. Second and subsequent year expenses are slated to grow at 2.9 percent per annum. Operating expenses will be offset by conferencing revenue.
	Local public funding	\$1,400,000.00
	Private funding	\$4,300,000.00
	Non-profit funding	\$1,300,000.00
	Other funding	\$0.00
	RCI funding required?	Yes
	RCI funding needed	\$279,200.00
	RCI funding proportion of cap ex	4%
	Total private funds	\$5,600,000.00
	Private ratio calc	77
	Total public funds	\$1,679,200.00
	Public ratio calc	23
	Other	\$0.00
	Other ratio calc	0
	Total funding	\$7,279,200.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	77 / 23 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>		<p>Conferencing</p> <p>The Free Enterprise Center will be a significant resource for our Northern Indiana community as an additional conferencing destination. According to the most recent (2009) economic impact study conducted for the South Bend/Mishawaka Convention and Visitors Bureau (CVB), direct business/visitor spending in this community accounted for \$408.3 million dollars. Other findings in the study indicated that approximately six million total visitors and pass through travelers spent time and money in the area. The survey also revealed that most visitors were from surrounding states, stayed an average of 2.5 days indicating they were here for business which included meetings, conventions and educational sessions. The CVB concluded there is significant un-met supply for meetings and convention space for the professional needs of the greater South Bend/Mishawaka area. Bethel College alone has turned away significant conferencing opportunities due to a lack of dedicated meeting space including, but not limited to, the Annual National Chinese Mandarin Church Conference and the Corporate Chick-Fil-A Leadership Conference.</p> <p>With additional conference space, Bethel will help meet this regional demand. The existing campus infrastructure already has catering, classroom, recreation, technology, and performance spaces and capabilities. Housing is also available on the campus during the summer months. One of the significant benefits to the community is that the addition of this project on the Bethel campus would now help meet the demand for conferencing space in our area in a more robust way during the nine months of the academic year; a period of time that was not available to the area CVB. Previously, the space available for conferencing during nine months of the academic year has been limited by the classroom and lecture hall demands of college. These additional nine months of availability will provide business for the local hotels, restaurants, and retail industries bringing additional tax and merchant revenue, and supporting the local job markets.</p> <p>Bethel College is uniquely positioned not only in terms of affordable conference price structures, but also in location. Geographically, Bethel College is midway between South Bend and Mishawaka and within easy reach of Elkhart County to the east. In the Northern Indiana market, Bethel is situated with two other religious institutions of higher learning that also serve and attract business in the religious conference market, each with its own unique offerings and target market. So strong is the draw to this area, that the CVB has designated the overall area as a Religious Conference Destination and markets the area as such to this target audience. Currently, of the three religious institutions, Bethel best serves the smaller conference segment of that market where attendance is capped at about 400. With the addition of the new conferencing space Bethel will be able to serve this audience on a year round basis, bringing additional businesses, organizations and groups with their dollars to the South Bend/Mishawaka community.</p> <p>It should be noted that within the South Bend/Mishawaka Convention and Visitors Bureau the city of Mishawaka and regions east are in the Bethel College Conferencing District validating Bethel's role and place in area conference hosting.</p> <p>Business Incubator and Customized Training</p> <p>In addition to the primary purpose of adding conference space to the community, the project will also add low cost office space for start-up businesses and entrepreneurs. This space will come with access to office equipment, college-level technology and advanced, dedicated conferencing space. New businesses and innovative of entrepreneurs will be fostered and developed within the Northern Indiana community through this incubator. As evidenced by the success of Innovation Park at the University of Notre Dame, colleges and universities are</p>
	<b>Anticipated return on investment (%)</b>	14.5	
	<b>Description of anticipated return on investment</b>	<p>Because the conference center will be attached to the existing food service and catering operations, new construction will require very little infrastructure build out specific to conferencing. Beside the meeting spaces themselves, the only conference center-specific new construction is storage space and a preparation and warming room for the catering operation. The college already employs physical plant, grounds and housekeeping staff. College Information Technology and AV staff are available for support, installations and training of Conference Services staff. All of these positions would normally be included as part of operations expenses when creating a new conference center. Because of built in infrastructure, Bethel has a competitive pricing advantage when bidding on events. This is a primary reason we believe adding this space will bring additional events to our community in the smaller to midsize market.</p> <p>While conferencing was envisioned for this project from the start, the impetus for the building was fostered by the need for welcoming and improved new student admission spaces, and to accommodate the desire to influence business development in our community; hence the creation of the Bethel College Free Enterprise Center itself. Within the Center, conference space is by its very nature clear span, open space construction. This is the most inexpensive space in the building. Little custom design or configuration is required. With the multi-use applications in the Center at large, even reception and restroom build-outs are shared with the other operations in the Center.</p> <p>Within this construction environment, return on investment is calculated at Net Asset Valuation. The asset value attributable to conferencing alone, which includes the cost of the dedicated space and initial capital expenses specific to conferencing equipment, is estimated at \$960,000. Based on an average net income over five years of \$136,325 we calculate average annual return of 14.5 percent.</p>	
	<b>Annual sales or other non-tax revenue generated (\$)</b>	402480	



<b>Description of annual sales or other non-tax revenue generated</b>	<p>Revenue will be generated from three main sources:  College/facility rental  Conference Service revenue  Commissions</p> <p>The annual sales amount listed above is the year three projection. Here are the estimates for the first five years:  Projected annual sales:  Year One: \$279,500  Year Two: \$335,400  Year Three: \$ 402,480  Year Four: \$462,852  Year Five: \$532,280</p>
<b>Jobs created (if applicable)</b>	6
<b>Description of jobs created (if applicable)</b>	<p>Conference and Event Services  Bethel currently staffs 1.5 positions: a director and one part-time assistant. With the new Center, the staff be will reconfigured as listed below, which creates a full staff of four individuals.  Director of Conference and Event Services  General Manager  Sales and Marketing Manager</p> <p>Business Incubator and Professional Development  Corporate and Customized Training Director</p>



## Project # 13 - Job Training Center

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Daniel Tyree
	Project Description	Job Training Center Plymouth Community School Corporation in conjunction with the North Central Area Vocational Cooperative, Work One, and Marshall County Economic Development Corporation would like to build a job training center in the old Lincoln Junior High. We are in the beginning stages of building a new junior high school. This training center would educate present employees who need training, incumbent workers, and high school students from all Marshall County Schools. Plymouth Schools would need to work in partnership to afford this type of a training center.
	Project Location	Lincoln Junior High School 220 N. Liberty Plymouth, IN 46563 Marshall County
	Project Category	Education and incumbent workforce
	Industry Alignment	The focus of the training center would be Advanced Manufacturing and Logistics, however other programs would be offered as identified by business expansion and retention (BEAR) one-to-one interviews with Marshall County businesses.
	Project Partners	Marshall County Economic Development Corporation Department of Workforce Development Plymouth Community School Corporation North Central Area Vocational Cooperative Work One State and Private Grants Department of Workforce Development
	Project Experience	Jerry Chavez, MCEDC Director, has experience working with training centers such as this. Daniel Tyree, Plymouth Superintendent, has created workforce training programs at Plymouth High School. Linda Yoder, Marshall County United Way and Community Foundation Director, has experience in the grant writing arena. Albert Hanselman, NCAVC Director, has been working with job training centers for many years.
Project Timeline	Project Start Date	12/1/2016
	Project End Date	1/1/2021
	Start within 12 months?	Yes
	Project Timeline	Initiate with Regional Cities, PCSC, and MCEDC in late 2015 2016 Get permission from Plymouth citizens to build a new junior high school. 2017 Finish construction of a new junior high. 2018 Remodel Lincoln to offer the needed training programs. 2021 Training center opens its doors.



Project Budget & Funding	Year 1 capital expenditures (\$)	\$100,000.00
	Year 2 capital expenditures (\$)	\$0.00
	Year 3 capital expenditures (\$)	\$5,500,000.00
	Year 4 capital expenditures (\$)	\$4,000,000.00
	Year 5 capital expenditures (\$)	\$750,000.00
	Total Capital Expenditures	\$10,350,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$2,000,000.00
	Total project budget	\$12,350,000.00
	Description of Capital Expenditures	<p>Year 1 = The committee works with an architect to design specific training areas. \$100,000</p> <p>Year 2 = Capital is raised to make remodel the junior high for the identified training programs.</p> <p>Year 3 = Remodel the junior high. \$5,500,000.00</p> <p>Year 4 = Move training equipment into the areas. \$3,500,000.00</p> <p>Interview and hire staff, market the training center in the Marshall County region and schools. \$500,000.00</p> <p>Year 5 = Grand opening of the training center. \$750,000.00</p> <p>Local manufacturing will need to provide \$4,100,000.00 (private funding).  Job training grants will pay for a lot of the modules for retraining and incumbent worker training. \$1,500,000.00 (non-profit funding)  Vocational and Perkins dollars will provide \$3,500,000.00 per year (public funding)  The state of Indiana pays the vocational dollars and Regional Cities would need to provide \$2,000,000.000 for the remodeling of the training center and some of the equipment. (State funding)</p>
	Description of Ongoing Expenditures	An ongoing budget would require expenditures of a little over \$2,000,000.00 per year. As training programs are added additional appropriations would be necessary. Staffing is always the most expensive part of a successful training center. Maintaining the building, insuring the building, and utilities will be needed.
	Local public funding	\$3,000,000.00
	Private funding	\$4,100,000.00
	Non-profit funding	\$1,500,000.00
	Other funding	\$1,750,000.00
	RCI funding required?	Yes
	RCI funding needed	\$2,000,000.00
	RCI funding proportion of cap ex	19%
	Total private funds	\$5,600,000.00
	Private ratio calc	45
	Total public funds	\$5,000,000.00
	Public ratio calc	40
	Other	\$1,750,000.00



<b>Other ratio calc</b>	14
<b>Total funding</b>	\$12,350,000.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	45 / 40 / 14

<b>Project Impact</b>	<b>Project impact and alignment with local or regional plans</b>	The goal of a training center is to provide training for the areas most needed for the present workforce. The center would also produce training for manufacturers who are looking for a region with talent development. This project has been identified as one of the most important projects in the region by Marshall County EDC. The following training programs have been identified as the ones most needed right now: Programmable Logic Control, Millwright Training, HVAC, Plumbing, Electrical, Logistics and transportation, Advanced Manufacturing, Manufacturing Production and Process, Quality Control, Middle Management Training, Welding, Metal Working, Diesel Mechanics, Nano Technology, Polymers, Culinary Arts, Cosmetology, and Entrepreneurial Training.
	<b>Anticipated return on investment (%)</b>	0
	<b>Description of anticipated return on investment</b>	Manufacturers would have the talent they need when they need it.
	<b>Annual sales or other non-tax revenue generated (\$)</b>	0
	<b>Description of annual sales or other non-tax revenue generated</b>	N/A
	<b>Jobs created (if applicable)</b>	0
	<b>Description of jobs created (if applicable)</b>	0



## Project #14 - Urban Development Revolving Loan Fund

Project Ownership, Partners & Experience (Project Type & Readiness)	<b>Project Information</b>	
	<b>Project Contact</b>	Scott Ford
	<b>Project Description</b>	<p>Urban Development Revolving Loan Fund</p> <p>A revolving loan fund to spur the development of mixed-use, urban infill development. \$8 million of seed funding from the RCI will be matched by an additional \$8 million in local public funding to leverage at least \$37 million of private investment toward the development of at least 367 multi-family housing units as part of mixed-use projects on urban sites within the region. The fund will provide mezzanine financing to help bridge an existing funding gap for several urban infill development /redevelopment projects. Despite a calculated unmet demand for urban living (see the Zimmerman Volk Housing Study as provided to Fourth Economy as background to RCNI) there remains a gap between construction cost and project value as calculated by NOI, which can make a project nonviable for the private developer to pursue and challenging for a bank to support. The revolving loan fund would provide a second position mortgage as a low-interest, interest only loan for projects until project stabilization (5-7 years) at which point the project could be refinanced and the loan would be repaid via bullet payment as part of project financing.</p> <p>Attaining bank financing for urban infill projects would be enhanced. Given the interest-only structure of the revolving loan, debt service requirements for the project would be reduced, making it easier to meet the bank's cash flow requirements. In addition, the second position mortgage and matching support from the municipality (e.g. TIF) will reduce the loan amount needed from the bank. The decreased Loan-to-Value ratio improves risk profile, making it easier for the bank to approve the loan.</p>
	<b>Project Location</b>	<p>Urban areas in the region, including downtown South Bend (as defined by the boundaries of the former South Bend Central Development Area); downtown Mishawaka (as defined by the former Riverfront Development Area), downtown Elkhart, Goshen and Plymouth. We have organized a task force comprised of local bankers, private real estate developers and public officials to guide the formalization of the steering committee, loan terms, etc.</p> <p>At least 9 specific projects are currently in the development pipeline and with the additional capital from this revolving loan, could be implemented in 2016/17. The goal for this fund would be to be announced with the RCI initiative in 2015 and launched in the second year of the grant.</p>
	<b>Project Category</b>	Redevelopment of physical assets (e.g., blighted assets, infill, etc.)
	<b>Industry Alignment</b>	Banking, Construction, Tourism, Real Estate
	<b>Project Partners</b>	<ul style="list-style-type: none"> <li>- Large employers in the region/regional communities interested in retaining/attracting talent</li> <li>- South Bend Heritage Foundation</li> <li>- Cities and Redevelopment Commissions (South Bend, Mishawaka, Elkhart, Goshen, Plymouth, etc.)</li> <li>- Developers</li> <li>- Banks</li> </ul> <p>The fund's Board would be made up of City representatives and appointees</p>



<b>Project Experience</b>	<ul style="list-style-type: none"> <li>- South Bend has operated an Industrial Revolving Fund (IRF) for 40 years. The fund was seeded initially via a grant from the EDA. Over that span, the original \$5 million grant has leveraged \$112 million, a ratio of 22.4 to 1, and has lead to the creation of 977 jobs and the retention of 1,966 jobs. The current loan value is \$10.3 million. The IRF board is comprised of representatives from the St Joe Chamber of Commerce, the Airport Authority, 1st Source Bank, community members and City officials.</li> <li>- Community Homebuyer Consortium: a partnership with several local banks and the City of South Bend, <a href="http://southbend.in.gov/government/content/housing-programs">http://southbend.in.gov/government/content/housing-programs</a></li> <li>- Business Development Corporation's 504 loan model/Board, which provides construction and equipment funding for owner-occupied properties: <a href="http://www.bdcloan.com/sba-504-loan-program/">http://www.bdcloan.com/sba-504-loan-program/</a></li> <li>- Elkhart has the Gateway Mile Revolving Loan Fund, in which the City partnered with six local banks for the initial fund</li> <li>- Downtown Mishawaka/Elkhart/Goshen urban core &amp; main street initiatives</li> <li>- Experience in working with federal New Market Tax Credit program</li> </ul>

<b>Project Timeline</b>	<b>Project Start Date</b>	8/1/2015
	<b>Project End Date</b>	8/1/2018
	<b>Start within 12 months?</b>	Yes
	<b>Project Timeline</b>	<p>Project timeline reflects that initial round of projects are anticipated to be funded primarily in Q1 of 2016, as well as 2017 and 2018. Short-term milestones:</p> <ul style="list-style-type: none"> <li>- May 2015: review by consortium of local banks and foundations to finalize optimal structure for administration of the fund</li> <li>- July RCNI submission</li> <li>- Immediately following establishment of RDA, Revolving Loan Fund is recognized by RDA and term sheet is distributed to candidate projects</li> <li>- Spring 2016: construction activity begins</li> </ul>

<b>Budget &amp; Funding</b>	<b>Year 1 capital expenditures (\$)</b>	\$29,100,000.00
	<b>Year 2 capital expenditures (\$)</b>	\$7,900,000.00
	<b>Year 3 capital expenditures (\$)</b>	\$16,330,000.00
	<b>Year 4 capital expenditures (\$)</b>	\$0.00
	<b>Year 5 capital expenditures (\$)</b>	\$0.00
	<b>Total Capital Expenditures</b>	\$53,330,000.00
	<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$80,000.00
	<b>Total project budget</b>	\$53,410,000.00
	<b>Description of Capital Expenditures</b>	Capital expenditures are based on the development costs associated with a number of mixed-use development projects totaling 367 new units of housing as well as retail / commercial space. The revolving loan fund would represent up to 15% of a total project cost, with the local city providing a matching 15% via TIF or other funding mechanism. The private development would be responsible for funding the balance of the project costs (70%) through a combination of equity from the developers and debt from local banks.



<b>Description of Ongoing Expenditures</b>	Calculated as 1% of loan fund for contracting to staff for credit analysis, loan processing and any necessary compliance associated with the loan portfolio. South Bend's IRF staff or the Business Development Corporation could be contracted to handle the loan administration duties.
<b>Local public funding</b>	\$8,000,000.00
<b>Private funding</b>	\$37,333,333.00
<b>Non-profit funding</b>	\$0.00
<b>Other funding</b>	\$80,000.00
<b>RCI funding required?</b>	Yes
<b>RCI funding needed</b>	\$8,000,000.00
<b>RCI funding proportion of cap ex</b>	15%
<b>Total funding</b>	\$53,413,333.00
<b>Variance between budget &amp; funding</b>	\$3,333.00
<b>Private/public/other funding ratio</b>	70 / 30 / 0

<b>Project impact and alignment with local or regional plans</b>	<ul style="list-style-type: none"> <li>- Aligns with City of South Bend's downtown residential market study (one of the background documents for RCNI project). Study revealed a calculated unmet demand in excess of 500 units of urban housing for downtown South Bend alone.</li> <li>- Existing and forecasted regional demand for downtown/urban housing</li> <li>- Mezzanine level of funding would help support small- to moderate-sized projects (whereas federal funding such as New Market Tax Credits is available for larger projects, and associated legal fees/requirements are expensive)</li> <li>- Urban housing development projects are already lined up around the region</li> <li>- Existing buildings could be redeveloped - vacant sites are available to be developed</li> <li>- Note: access to grocery stores seen as an existing impediment to urban living</li> <li>- Downtown South Bend currently doing a project to convert one-way streets to two-way streets - this effort would complement efforts to re-vitalize downtown with housing and amenities</li> </ul>
<b>Anticipated return on investment (%)</b>	11.7
<b>Description of anticipated return on investment</b>	<p>The \$53M in mixed-use developments projects associated with this fund are estimated to add at least \$43 million to the local property tax base. The resulting property tax revenue is estimated to be at least \$938,667 annually. Based on the property tax revenues alone, the project would recoup its initial investment in 8.5 years. Moreover, as this is a revolving loan fund, the fund would accrue principal through repayment and after 5 years the second round of loans would commence.</p> <p>The total economic impact from this project is estimated to exceed \$83 million, with potential sales tax generation in excess of \$1.5 million.</p>
<b>Annual sales or other non-tax revenue generated (\$)</b>	\$1,561,779.00
<b>Description of annual sales or other non-tax revenue generated</b>	State and local sales tax figures calculated via Ball State's CBER Data Economic Impact calculator. Using the per unit basis of the NAHB, the total sales tax generation associated with 367 units would be \$1,855,951.
<b>Jobs created (if applicable)</b>	414
<b>Description of jobs created (if applicable)</b>	<p>165 (non construction) 250 (construction related)</p> <p>Job creation per National Association of Home Builders 2014 National Economic Impact Report. Multiplier of 1.13 per multi-family unit.</p>



## Project #16 - Blue Ways - Leverage the River

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Scott Ford
	Project Description	<p>Blue Ways - Leverage the River (Greater Howard Park Neighborhood)</p> <p>This \$2.5 million infrastructure project would amplify a public investment of \$17.5 in coordinated quality of place improvements along the St. Joseph River from the Farmers Market to Seitz Park to leverage further private development, especially residential uses, in the area around Howard Park.</p> <p>Specifically this project would apply funds to upgrade portions of the Northside and East Bank Trails, part of the City's Riverwalk system which is a part of a larger effort to connect the campus of several key educational institutions, including Saint Mary's College, Holy Cross College, University of Notre Dame, Indiana University South Bend and Purdue University's South Bend Extension. Specific improvements to the trail include (new routing near former Transpo site, adding bicycle/pedestrian connections, removing physical barriers, installing/improving lighting and serving proposed new Notre Dame boathouse). The trail development would occur in concert with the following:</p> <ol style="list-style-type: none"> <li>1) Redevelopment of the former Transpo site (a brownfield) into 90 units of attached and detached urban housing,</li> <li>2) Construction of the River Race Flats, a mixed-use building containing 8,000 square feet of retail space, 9,000 square feet of office space, and 32 apartment units,</li> <li>3) Renewal and add amenities to Howard Park (new/renovated community center, new/renovated ice rink, amphitheater, sand volleyball courts, mini-marina), and</li> <li>4) Removal Mishawaka Avenue cloverleaf ramp at Eddy Street to facilitate further riverside development.</li> </ol>
	Project Location	Along the St. Joseph River, between Farmers Market (Sample Street bridge) and Seitz Park in South Bend, St. Joseph County
	Project Category	Quality of place
	Industry Alignment	Real Estate Development, Construction, Retail
	Project Partners	Bike Michiana Coalition Bike the Bend Century Builders City of South Bend Community Investment / Redevelopment Commission City of South Bend Parks & Recreation City of South Bend Public Works Indiana Department of Transportation (potential) Matthews LLC South Bend Parks Foundation South Bend Scullers University of Notre Dame
	Project Experience	With private and public sector partners, the City of South Bend has completed numerous development and neighborhood revitalization projects. These projects often include street, shared use path, and park improvement elements.
Project Timeline	Project Start Date	8/1/2015
	Project End Date	12/31/2020
	Start within 12 months?	Yes
	Project Timeline	Much of the housing development to be done by the end of 2018, with full buildout of the former Transpo site by 2020. Ground breaking for former TRANSPO is set to occur in summer 2015. ND Boathouse is already under construction with a spring 2016 completion. Riverwalk upgrades to be largely completed by the end of 2016. Supporting infrastructure projects are to be done in 2015-2016.
Year 1 capital expenditures (\$)		
		\$26,050,000.00



Project Budget & Funding	Year 2 capital expenditures (\$)	\$12,220,000.00
	Year 3 capital expenditures (\$)	\$14,860,000.00
	Year 4 capital expenditures (\$)	\$5,880,000.00
	Year 5 capital expenditures (\$)	\$3,790,000.00
	Total Capital Expenditures	\$62,800,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$0.00
	Total project budget	\$62,800,000.00
	Description of Capital Expenditures	Capital expenditures will be made to improve segments of the Riverwalk System - a multiuse path adjacent to the River; construct new housing and mixed-use buildings; build a new boathouse along the river; renovate the Howard Park ice rink, community center, and other features; and to complete supporting infrastructure work, including new streets, sewers, and removal of the cloverleaf ramp.
	Description of Ongoing Expenditures	Ongoing expenditures for the public components of this project will be similar to the existing expenditures for street, trail, and park maintenance in the area.
	Local public funding	\$17,500,000.00
	Private funding	\$42,700,000.00
	Non-profit funding	\$100,000.00
	Other funding	\$0.00
	RCI funding required?	Yes
	RCI funding needed	\$2,500,000.00
	RCI funding proportion of cap ex	4%
	Total private funds	\$42,800,000.00
	Private ratio calc	68
	Total public funds	\$20,000,000.00
	Public ratio calc	32
	Other	\$0.00
	Other ratio calc	0
	Total funding	\$62,800,000.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	68 / 32 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>The project will make Howard Park, the adjoining stretch of the St. Joseph River, and the surrounding neighborhoods a destination that draws new residents, supports commercial development, and provides a signature amenity to the region. Over \$40 million in private development could be realized in the next five years.</p> <p>The path improvements will greatly improve a core section of South Bend's Riverwalk system and serve as a link in the broader, regional Indiana-Michigan River Valley Trail. The Howard Park improvements will make it a jewel in the Parks system and will be a draw to the river, downtown, and the revitalizing Howard Park/East Bank area.</p> <p>Improvements would be especially attractive to young professionals. The cloverleaf removal will allow a 1960s highway segment within a neighborhood to be eliminated in favor of expanded green and development space along the river.</p> <p>The overall project, especially its housing components, implements key portions of the East Bank Village Master Plan and the Howard Park Neighborhood Plan. The trail component is part of the South Bend Bikeways planning map. The Howard Park improvements and cloverleaf ramp removal are both proposed as part of the Howard Park Neighborhood Plan.</p>
	<b>Anticipated return on investment (%)</b>	23.4
	<b>Description of anticipated return on investment</b>	The project is estimated to add at least \$39 million to the local property tax base. The resulting annual property tax revenue is estimated to be at least \$467,000. Total economic impact for retail operations connected to this project is estimated at \$1.2 million, creating an annual indirect business tax impact of \$117,000, approximately evenly divided to state and local governments. The \$2.5 million Regional Cities investment, then, will increase estimated annual tax revenues (local and state) by about \$584,000. The payback period to break even on this public investment is 4.3 years.
	<b>Annual sales or other non-tax revenue generated (\$)</b>	780000
	<b>Description of annual sales or other non-tax revenue generated</b>	Annual retail sales of about \$780,000 are estimated to result from the commercial portions of this project.
	<b>Jobs created (if applicable)</b>	15
	<b>Description of jobs created (if applicable)</b>	15 (permanent) 500 (temporary)



## Project #17 - Market District Blue Zone Initiative

Project Information	
<b>Project Contact</b>	Crystal Welsh
<b>Project Description</b>	<p><b>Project Title:</b> Downtown Elkhart's Market District Blue Zone Initiative</p> <p>The Regional Cities Initiative is built on the idea of creating Innovation Zones that spur creative solutions to commur the City of Elkhart, the Innovation Zone is downtown Elkhart. The City has developed a plan to move forward with lc partners in establishing Elkhart as a Blue Zone community with downtown as the center of that Blue Zone. This is o solution to our community's needs today and into the future. The program is built around 9 key concepts that stimul and engaged residents that live full lives and enjoy personal success as well as contributing to the success of their c The City has been moving towards creating this vision for a healthy and satisfied Elkhart for many years. The Down Redevelopment Plan is the results of over 2 years of planning and public engagement through the SoMa (Supportin initiative. This plan was developed with the assistance of over 200 community members, civic leaders and busines that created the vision for Elkhart moving forward for the next 20 years. The Plan formalizes that initiative into action that will continue the success of downtown redevelopment efforts over the past 30 years and expands downtown Ell neighborhoods surrounding Main Street. The SoMa initiative clearly illustrated that downtown is the heart of our city vibrant and active downtown we can transform our community.</p> <p>The development of the proposed project will transform downtown Elkhart into a vibrant, full service, city center by p scope of services, recreation, residential and commercial amenities the community has envisioned for a successful i make a bold step forward by creating the Elkhart Blue Zone.</p> <p>The Blue Zone project will transform this area into an active, healthy and community-oriented neighborhood that tak existing assets such as the RiverWalk, sports fields, city parks, and existing health and wellness oriented businesse includes the repurposing of a shopping center and development of new residential units, development of a new com facility, and the establishment of a sports center and outdoor multi-use sports fields.</p> <p>The mixed-use residential and commercial development that takes advantage of the sites proximity to the Elkhart Ri RiverWalk as well as the many downtown attractions and amenities. The project will include the development of up: redesigned commercial center and public amenities such as an extension of the existing RiverWalk Multi-Use path s increased access points to the Elkhart and St. Joseph Rivers.</p> <p>The proposed housing project would include 400 housing units in two phases. The first phase will consist of 200 rer second phase will include 200 units but will be a mix of rental and for sale units. These units will provide the first ne housing units in downtown Elkhart since the 1980s. Housing data indicates both a demand for market rate housing increasing rents and housing values that would support the high quality development proposed. Elkhart has followe</p>
<b>Project Location</b>	<p>The project is located in Elkhart Indiana which is part of Elkhart County.</p> <p>The project site includes several properties in the Market District of Downtown Elkhart including Easy-Shopping Cen the 500 and 600 Block of East Jackson Boulevard) and the former Elkhart Foundry site at 318 South Elkhart Avenue Link to project graphics: <a href="http://bit.ly/1Rgoa43">http://bit.ly/1Rgoa43</a></p>
<b>Project Category</b>	Redevelopment of physical assets (e.g., blighted assets, infill, etc.)
<b>Industry Alignment</b>	Housing and Commercial Development
<b>Project Partners</b>	<p>The City of Elkhart will be the sponsor for this project through the City of Elkhart Redevelopment Commission with s the Community and Redevelopment and Economic Development Departments.</p> <p>The Redevelopment Commission already owns the former Foundry site. This site will be the location of phase one o development. A well-known and respected residential developer with ties to Elkhart has provided a proposal for the i first 200 apartment units and could be a project partner.</p> <p>Partners for the Easy Shopping component of the project would include the current property owner, business tenant center and a residential developer. The Redevelopment Commission is working with the current owner of the Easy S to determine if they would need to acquire that property to facilitate this project. The major tenant of the Easy Shopp local supermarket chain that is interested in moving from their current location farther north within the center to incre of their store, make a much needed reinvestment in their business at the location and open-up access to the Elkhart two of the residential development. The same developer of the phase one residential developer could also be a part</p>

Project Ownership, Partners & Experience  
(Project Type & Readiness)



<b>Project Experience</b>	The residential development partner has been successfully developing real estate since 1993 and has consistently 150 developers nationally for the past eight years for multi-family developments. The firm has over 400 employees and over 46 properties and over 8,000 units. They are a full service firm and provided the development, construction and expertise for their projects.
	The major tenant for the commercial redevelopment phase is a local supermarket chain that has been successfully providing service and products for our region since the 1940s. They operate 21 stores in the region and are major supporters of activities and events.

<b>Project Timeline</b>	<b>Project Start Date</b>	7/1/2015
	<b>Project End Date</b>	7/31/2019
	<b>Start within 12 months?</b>	Yes
	<b>Project Timeline</b>	<p>The July 1, 2015 start date is based on the funds becoming available at that time. The following timeline is based upon when funds from the Regional Cities program would be awarded to the project.</p> <p><b>Phase One Residential:</b> The Redevelopment Commission owns the shovel ready property at the former Elkhart Foundry. The buildings have been regarded for redevelopment and the environmental conditions have been reviewed by IDEM. In addition, the Commission has already reviewed and is in favor of the proposal submitted for the site but could not move forward without securing the additional funds that would be needed to complete the project. With the 20 percent Regional Cities funds, there would be sufficient dollars to move this project forward. The timeline for the project to be completed is 20 months. Construction of the development would start six months from the announcement of the award of funding.</p> <p><b>Commercial Redesign and Redevelopment:</b> The City has already met with the property owner and major tenant to develop a proposal for this project. Again, due to the lack of additional public funds for the project, the discussion has not moved further but all parties are ready and motivated to move forward once Regional Cities funds become available. Because the existing building would continue to operate while construction is underway, construction of the development would start six months from the announcement of the award of funding. Construction of the new building and redesigned shopping center would take 12-18 months.</p> <p><b>Phase Two Residential:</b> The proposed site of the second phase of residential units is the current location of the supermarket. The project would include other two portions of the project with acquisition and design during the first six months after the announcement of the funding. But because the new commercial facility would have to be constructed and business operations moved, the completion of this phase of residential units would be approximately 20-24 months after that initial project and take 18-20 months. The project is attractive to both the commercial component of the project as it allows for uninterrupted service to their clients, but it is also attractive with the phase one residential project as the construction will begin as the phase one is completed allowing for the transition from one location to the next with ease.</p>

<b>Year 1 capital expenditures (\$)</b>	\$18,000,000.00
<b>Year 2 capital expenditures (\$)</b>	\$22,000,000.00
<b>Year 3 capital expenditures (\$)</b>	\$13,000,000.00
<b>Year 4 capital expenditures (\$)</b>	\$12,000,000.00
<b>Year 5 capital expenditures (\$)</b>	\$0.00
<b>Total Capital Expenditures</b>	\$65,000,000.00
<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$30,000.00
<b>Total project budget</b>	\$65,030,000.00



Project Budget & Funding	<b>Description of Capital Expenditures</b>	<p>The proposed \$65,000,000 in project expenditures will include:</p> <p>\$27,000,000 for phase one and \$28,000,000 for phase two of residential development including property acquisition infrastructure improvements, development services, construction costs, preliminary leasing and marketing and legal</p> <p>\$10,000,000 for the commercial redevelopment component which would include property acquisition, site preparatio improvements, development services, construction costs, legal fees, and purchasing of inventory for sale.</p>
	<b>Description of Ongoing Expenditures</b>	The funds to manage and operate the private developments are built into their individual project proformas. Any pub such as the streets, lighting, RiverWalk, etc. will be funded and managed through the City of Elkhart and its related c estimate of \$30,000 per year is provided based on past maintenance needs on the RiverWalk.
	<b>Local public funding</b>	\$13,000,000.00
	<b>Private funding</b>	\$39,000,000.00
	<b>Non-profit funding</b>	\$0.00
	<b>Other funding</b>	\$0.00
	<b>RCI funding required?</b>	Yes
	<b>RCI funding needed</b>	\$13,000,000.00
	<b>RCI funding proportion of cap ex</b>	20%
	<b>Total private funds</b>	\$39,000,000.00
	<b>Private ratio calc</b>	60
	<b>Total public funds</b>	\$26,000,000.00
	<b>Public ratio calc</b>	40
	<b>Other</b>	\$0.00
	<b>Other ratio calc</b>	0
	<b>Total funding</b>	\$65,000,000.00
	<b>Variance between budget &amp; funding</b>	(\$30,000.00)
	<b>Private/public/other funding ratio</b>	60 / 40 / 0
Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>This project will be critical to further the revitalization of downtown Elkhart specifically but will impact the city as a wh is the heart of our city and all residents and visitors can call downtown their own.</p> <p>A city's downtown plays an important role in defining the community's character and providing important place for th come together regardless of the neighborhood in which they live. Elkhart is committed to providing a high quality of l and a wonderful experience for its visitors. By creating a vibrant and engaging center that attracts people, downtow economic drivers by spurring private investment through construction projects, job creation and retention, equipmen innovation in new technologies and improved business operations and more.</p> <p>As the local downtowns of our region are revitalized and take their place as economic centers, the entire area benef major cities in this Regional City, the redevelopment of Elkhart will help to transform this area in several ways.</p> <ol style="list-style-type: none"> <li>1. Combat perception of "rust-belt" community with no future;</li> <li>2. Provide amenities and attractions to develop a marketing strategy that speaks to the region as a whole and its ne residents, with recent increases in population, as opposed to individual counties of 200,000 (Elkhart) or 275,000 (St.</li> <li>3. Provide complementary but not competing assets and attractions to provide a high quality of life for regional resid</li> <li>4. Provide quality residential and commercial opportunities region-wide so residents can have a full and rewarding li communities.</li> </ol> <p>Plans:</p> <ol style="list-style-type: none"> <li>1. The need for a broader range of housing types and values was identified in the 2015-2020 City of Elkhart Consoli</li> <li>2. The Redevelopment of this area and specifically this project was identified in the 2014 Downtown Elkhart Redeve</li> <li>3. The need for higher-value housing in the City of Elkhart was identified in the 2014 Elkhart County Housing Needs</li> <li>4. The need for market-rate housing and a revitalized commercial center in downtown was identified in the 2013 Sol Strategy.</li> </ol>
	<b>Anticipated return on investment (%)</b>	10.5



## Project Impact

<b>Description of anticipated return on investment</b>	<p>The proposed 600 new residents that will live and shop in downtown Elkhart will provide approximately \$30,000,000 income and \$12,000,000 in retail sales. This would result in an estimated income tax from the residents of approximately \$725,000 annually. The projects are anticipated to generate approximately \$840,000 in real estate taxes annually. In addition, these residents will create the vitality and energy needed to continue to revitalize downtown and improve the quality of life of the entire region.</p> <p>The commercial redevelopment project will generate an estimated \$5,000,000 in retail sales, payroll of over \$2,000,000 in real estate taxes annually.</p> <p>Total projected real estate taxes of \$840,000 annually along with the sales taxes generated of roughly \$1,190,000 from retail sales as well as annual income taxes from the residents of approximately \$475,000 put the total cash return at approximately \$2,480,000 annually. With the public investment of \$26,000,000 this project would have a payback period of about 10 years.</p>
<b>Annual sales or other non-tax revenue generated (\$)</b>	17000000
<b>Description of annual sales or other non-tax revenue generated</b>	annual sales would be generated from the commercial sales for this project of \$5,000,000 annually as well as the \$1,190,000 in annual sales from the 600 residents living in downtown in the residential development.
<b>Jobs created (if applicable)</b>	495
<b>Description of jobs created (if applicable)</b>	<p>Residential Development will result in approximately 250 construction jobs per phase; 30-40 permanent jobs related to the development and additional with the commercial space for restaurants and small commercial spaces within the development.</p> <p>Commercial Development will result in approximately 100 construction jobs; 105 permanent jobs related to the retail development.</p>



### Project #18 - "Ironworks Plaza" Mishawaka Riverfront Mixed-Use Development

Project Information	
<b>Project Contact</b>	Flaherty & Collins Properties- Brian R. Prince II, J.D., City of Mishawaka- Kenneth B. Prince, Executive Director City Planner
<b>Project Description</b>	<p>"Ironworks Plaza"</p> <p>Mishawaka Riverfront Mixed-Use Development</p> <p>The proposed project will consist of approximately 233 market rate luxury units and approximately 11,000 SF of retail and restaurant space. Additionally, the project calls for a parking structure with around 394 covered spaces. These will be very high end units in this higher density project that will be developed on the St. Joseph River/Beutter Park Riverfront on about 2.5 acres in downtown Mishawaka. This development will have the same resort style amenities as can be seen at any of Flaherty and Collins other mixed use urban developments. The project will take advantage of the river views and incorporate a roof top sky bar where our residents can interact with one another. This will truly be a first class project unlike anything else in the market.</p>
<b>Project Location</b>	Two City blocks located in the heart of downtown Mishawaka, located on the former Uniroyal Brownfield Redevelopment Area. The property is bordered by Ironworks Avenue on the north, Mill Street to the east, Mill Street to the west and Front Street to the south.
<b>Project Category</b>	Talent attraction
<b>Industry Alignment</b>	Generically, the attraction of professional talent
<b>Project Partners</b>	<p>Developer-</p> <p>Flaherty and Collins Properties</p> <p>8900 Keystone Crossing, Suite 1200</p> <p>Indianapolis, IN 46240</p> <p>(317) 816-9300</p> <p>City of Mishawaka-</p> <p>Acting by and through it's Redevelopment Commission</p> <p>600 East Third Street</p> <p>Mishawaka, IN 46544</p> <p>(574) 258-1625</p>
<b>Project Experience</b>	<p>Flaherty and Collins Properties LLC</p> <p>Full service, and fully integrated company consisting of Development, Construction, and Management</p> <p>Properties Managed: 100+</p> <p>Units Managed: 15,492</p> <p>Property Types</p> <p>Market Rate: 11,448</p> <p>Affordable: 4,044</p> <p>Office: Indianapolis, IN (Keystone at the Crossing)</p> <p>Total # of Employees: 450+</p> <p>Flaherty &amp; Collins is the most active mixed-use, multi-family developer in the Midwest</p> <p>Over one-half billion dollars currently in development</p> <p>Consistently rated Top-50 Developer nationally</p> <p>City of Mishawaka Redevelopment Commission</p> <p>In the past 8 years, the City has entered into 5 different development agreements with four different developers in partnership to sell land and make millions of dollars of public improvements in order to successfully redevelop former brownfield or underutilized property located within a quarter mile of the proposed development.</p>

Project Ownership, Partners & Experience  
(Project Type & Readiness)



Project Timeline	Project Start Date	4/1/2016
	Project End Date	4/1/2018
	Start within 12 months?	Yes
	Project Timeline	Projects of this magnitude take a bit longer to design and construct because of the complexities involved with a project that is truly one solid structure of this magnitude. We anticipate that a realistic closing would be Spring 2016 and construction would start around 30 days after that. We would anticipate 18-22 months construction time to complete the project. We would expect to be able to deliver the first units and retail space within 12-14 months of construction. Once construction has been completed, we anticipate another 6 months to reach stabilization.

Project Budget & Funding	Year 1 capital expenditures (\$)	\$19,525,249.50
	Year 2 capital expenditures (\$)	\$19,525,249.50
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$39,050,499.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	
	Total project budget	\$39,050,499.00
	Description of Capital Expenditures	The total project budget is roughly \$39 million. This includes both hard and soft costs to get the project to completion  The developer contribution/cost will be 23 million dollars. (60%)  The City contribution will be \$7.7 million dollars obtained from tax increment on the project and other funds, invested into the project (20%)  The requested grant from the Regional Cities Fund \$7.7 million dollars (20%).
	Description of Ongoing Expenditures	Total operating expenses are ballpark \$1.5 million dollars of that about \$300k would be management related expenses and salaries and maintenance crew, another \$700K or so would be allocated to miscellaneous expenses. Ongoing funding for maintenance will come through a portion the rents paid for the apartments and commercial space. Maintenance includes all outside and roof top amenities. What is unique to this project is that as part of the City/Regional Cities funding, a 150 public parking spaces will be provided in the parking garage to serve the parking needs for the public, including for Beutter Park located adjacent to the site immediately north of Ironworks Avenue.
	Local public funding	\$7,761,266.00
	Private funding	\$23,527,967.00
	Non-profit funding	\$0.00
	Other funding	\$0.00
	RCI funding required?	Yes
	RCI funding needed	\$7,761,266.00
	RCI funding proportion of cap ex	20%
	Total private funds	\$23,527,967.00
	Private ratio calc	60
	Total public funds	\$15,522,532.00



<b>Public ratio calc</b>	40
<b>Other</b>	\$0.00
<b>Other ratio calc</b>	0
<b>Total funding</b>	\$39,050,499.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	60 / 40 / 0

<b>Project impact and alignment with local or regional plans</b>	<p>The state is seeing a very high amount of what is known as brain drain. This occurs where the youth in these regional cities go off to college but do not return home to work in the regions left. They are seeking opportunities for lifestyles that they can't obtain in the Regional cities of Indiana. The young professionals are seeking a more urban living style with walkable communities. The housing supply is not adequate for this demographic in most of our Regional cities, the rental housing product is dated. As a result of this loss of talent, the Regions are not able to grow as fast as they could if more companies would invest opening offices or business in the Region. One very important factor business consider when moving into a new area is what kind of housing is available for their employees. If an employee is going in for an interview and trying to decide whether to accept a job offer or not the housing component is very key in their decision making process. This demographic are renters by choice and they are more transient and not looking to buy houses or condos quite yet. There is a gap in the rental market for these young professionals with high salaries that are being forced to live outside of the Region and drive in for work or being forced to settle in their choice of housing. Flaherty and Collins past projects on average consist of about 70% tenants that have come from outside of the direct area, thus bringing in new tax dollars that were not there before and also bringing with them more disposable income that can support the local business and restaurants. The better the housing and more desirable the Region, the more attractive the Region is for bigger companies to open offices and bring more jobs.</p> <p>From a City perspective, this project is central to the Mishawaka Rivercenter Master Redevelopment Plan that was created in 1999 by the City as part of the City's planned acquisition and demolition of the former Uniroyal industrial complex that included a conglomeration of over 50 buildings and 1.7 million square feet of industrial space. Since clearing the site in 2002, the City has expended over ten million dollars to develop a world class park and riverwalk system in part to attract the mixed use, urban, architecturally significant, pedestrian friendly development that this project would be the central piece.</p>
<b>Anticipated return on investment (%)</b>	9%



Project Impact	<b>Description of anticipated return on investment</b>	<p>Flaherty &amp; Collins would like to obtain a reasonable 8.8% unleveraged return. In order for us to obtain our desired return in this project, we are capped at contributing \$23,527,966 of the \$39,050,499 Total Development Cost. Our return is a function of the Net Operating Income of the project. The projected NOI for this project is roughly \$2 million annually before debt service.</p> <p>St. Joseph county has both a County Option Income Tax as well as a County economic development income tax.</p> <p>The county resident tax rate for this is 1.75%</p> <p>A project consisting of 233 units with 1.5 persons per unit will have over 340 residents.</p> <p>At a minimum tenants must gross three times monthly rent in order to rent a unit, average unit rent is \$1,205 a month, this would mean minimum income on average would be around \$43,000 annually.</p> <p>We normally see incomes much higher in our developments around \$80,000-\$90,000 on average.</p> <p>Being conservative, \$50,000 x 349 residents = \$17,450,000 of income from residents</p> <p>\$17,450,000 x 1.75% (EDIT) = \$305,375 annually (70% of this will be from new residents from outside the area.</p> <p>Additionally, during construction the state and city will benefit from additional taxes. We will have material cost which are normally half the hard construction cost. In this case roughly \$15 million in material purchases will be taxable, the income of those businesses we purchase from will then be taxed. The construction workers that we pay on this project will also pay income taxes and most will</p>
	<b>Annual sales or other non-tax revenue generated (\$)</b>	\$ 6,500,000.00
	<b>Description of annual sales or other non-tax revenue generated</b>	<p>When complete, and leased up, tenants at the facility will support a significant level of retail and services on an ongoing basis. The retail support from the project would increase support for urban amenities in the immediate area, which would be expected to increase the marketability of additional projects that can benefit from those amenities. As outlined in the hypothetical project, a 233 unit project would be expected to generate over \$6 million in retail sales annually, much of which would be net new to the community.</p> <p>In summary, the real value is the transformative nature of a high-density urban infill project which is almost non-existent in the market currently. This project will tend to attract high income residents which support a range of economic activity, as well as contributing substantially to a jurisdiction from a fiscal perspective. These are typically new residents to the community, as the housing type is one that was not previously available locally, allowing companies in this region more ability to compete for talent nationwide.</p>
	<b>Jobs created (if applicable)</b>	340
	<b>Description of jobs created (if applicable)</b>	<p>The major economic impacts associated with this type of project are associated with either initial construction or ongoing tenancy. Construction expenditures support a significant level of direct employment in the highly paid construction trades, while also generating secondary and induced impacts. As this type of construction is more complex than suburban wood frame projects, it requires a more skilled and highly compensated workforce. On average we tend to see about 10-15 construction jobs created for every \$1 million of construction cost. At a hard construction cost of \$31 million, at least 310 construction jobs should be created.</p> <p>Furthermore, the project itself will have onsite management and maintenance staff. The retail component will also provide additional employment.</p>



## Project #19 - Armory Kitchen + Lofts

Project Information	
<b>Project Contact</b>	Brad Emberton
<b>Project Description</b>	Conversion of a vacant 20,551 SF building, which originally housed the South Bend Armory and then a Community/Recreation Center for the South Bend Parks Department, into a thriving urban mixed-use development offering residential rentals and a regional culinary hub. The Armory Lofts will redevelop 12,100 SF into eight residential rental units (apx. 1,500 SF per unit renting for \$1,150/month). The Armory Kitchen will convert 8,443 SF into a regional culinary hub, centered around a shared commercial kitchen for 24/7 use by food entrepreneurs, acting as a commissary for food truck operators (ordinance going through city council currently) as well as entrepreneurs to make product in bulk for distribution and need space to store, prepare, and process their products. This fully equipped workspace will be open 24/7 and will rent private or shared space as needed to support entrepreneurs. With booming demand for artisanal foods and drinks, shared kitchens can help entrepreneurs get into a licensed kitchen and start a business at a fraction of the traditional start up costs. Armory Kitchen will also provide a collaborative environment, connecting "foodpreneurs" to each other and to business support and technical assistance with branding, sales and distribution. Additional components to this food hub include a distillery with a tasting room and classes, educational components including a micro vertical farm supplying fresh produce to the distillery and the kitchen. The distillery will be in partnership with an existing successful brand new to the South Bend market. Armory Kitchen will cultivate the kind of food businesses the community wants, through its alumni businesses opening their own brick-and-mortar establishments and adding to the vibrant culinary experience in cities across the Michiana region. A multipurpose space will be available for tastings, meetings, training, demonstrations and classes.
<b>Project Location</b>	727 South Eddy Street, South Bend, IN 46615 St. Joseph County East Bank Village of Downtown South Bend, at the Intersection of Eddy St. and Northside Boulevard. The building is adjacent to the St. Joseph River offering great views and immediate access to the River walk, Howard Park and Downtown South Bend.
<b>Project Category</b>	Redevelopment of physical assets (e.g., blighted assets, infill, etc.)
<b>Industry Alignment</b>	Culinary Arts (Food entrepreneurship), Spirit distillery and vertical farming) Commercial Kitchen supports the restaurant industry, particularly entrepreneurs and food truck service
<b>Project Partners</b>	Emberton Development (Private Developer) City of South Bend (Owns building, in process of securing appraisal and selling the building) Terra Spice, Philip Abbot Distillery University Partner (i.e. Ivy Tech or IUSB) Food Truck Entrepreneur(s) Consultant for Vertical Farming Kitchen Sponsor/ consultant
<b>Project Experience</b>	Redevelopment of 3 story, 6,000 SF vacant blighted building into four residential lofts and a 2,000 SF ground level café. Own nine commercial/multifamily properties across the Michiana region (Benton Harbor, Harbert, Niles, South Bend & Mishawaka) 15 years commercial real estate experience (leasing, management and development) Ivy Tech Culinary School coursework and restaurant ownership and operation experience 20 years business ownership and operation experience



Project Timeline	Project Start Date	8/1/2015
	Project End Date	8/1/2016
	Start within 12 months?	Yes
	Project Timeline	8/1/15: Environmental Remediation 9/1/15: Ownership Transfer 10/1/15 - 11/30/15: Exterior Work (Masonry, Site Prep, Roof) 10/1/15 - 12/31/15: Site Improvements (Utility connections, etc.) 1/1/16 - 6/30/16: Interior Construction 4/1/16 - 5/1/16: Equipment Set up 1/1/16 - 7/1/16: Pre leasing 8/1/16: Residential Move in

Project Budget & Funding	Year 1 capital expenditures (\$)	
	Year 2 capital expenditures (\$)	\$1,730,000.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$1,730,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$63,640.00
	Total project budget	\$1,793,640.00
	Description of Capital Expenditures	Building construction (environmental remediation, masonry, roof, windows, doors, site work, decks, interior build-out for lofts and commercial kitchen, professional fees, equipment for commercial kitchen and vertical farm.
	Description of Ongoing Expenditures	Taxes, property maintenance; farm & kitchen operations separate business entities leasing and paying op costs direct. Rental Income from 8 residential units will cover the Ongoing expenditures for real estate taxes, property management and maintenance. Income from commercial kitchen will be reinvested into the food hub programming
	Local public funding	\$350,000.00
	Private funding	\$1,030,000.00
	Non-profit funding	\$0.00
	Other funding	\$0.00
	RCI funding required?	Yes
	RCI funding needed	\$350,000.00
	RCI funding proportion of cap ex	20%
	Total private funds	\$1,030,000.00
	Private ratio calc	60
	Total public funds	\$700,000.00
	Public ratio calc	40
	Other	\$0.00
	Other ratio calc	0



<b>Total funding</b>	\$1,730,000.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	60/40

Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>The building sits in the center of a burgeoning food district, including the South Bend Farmers Market (year round market open 3-4 days per week featuring over 60 vendors and a restaurant), Bamber's Superette (specialty food store and deli) and Oh Mammias Italian Deli and Sandwich Shop. It is also in the immediate area of The Brick (bar and event venue), Indiana University South Bend (7,859 students), the new Notre Dame Boat House and the Transpo housing development. It is also within walking distance to Downtown South Bend, particularly its growing East Bank Village, and the Sunnymede neighborhood. The proposed redevelopment complements and expands upon the existing uses in the neighborhood. The location, which is just 4 minutes drive from Ivy Tech Community College, which has a robust Culinary Arts program with concentrations in Baking and Pastry Arts, Culinary Arts and Restaurant Management. A partnership with Ivy Tech would provide their students and graduates with an opportunity to move business concepts to the next level.</p> <p>The project sits within the City of South Bend's Blue Ways project which is identified to focus on the greater Howard Park Neighborhood, from the Farmers Market on the east to Sietz Park in Downtown South Bend on the west.</p>
	<b>Anticipated return on investment (%)</b>	4.85
	<b>Description of anticipated return on investment</b>	4.85% ROI per year for initial 3 years; forecast growth from commercial kitchen and farm to equal 10% annually. Annual Income \$71,480 / Total Project Costs \$1,475,000 = 4.85%
	<b>Annual sales or other non-tax revenue generated (\$)</b>	1785400
	<b>Description of annual sales or other non-tax revenue generated</b>	Food Trucks (3): 450000 Vertical Farm: 150000 Construction:1,075,000.00 Rental Income:110400
	<b>Jobs created (if applicable)</b>	17
	<b>Description of jobs created (if applicable)</b>	Farming: 2 Food Trucks: 6 Prop. Mgt: 1 Construction: 8 (year 1)



## Project #20 - Elkhart Hotel Redevelopment

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Dan Boecher - Executive Director Downtown Elkhart Incorporated
	Project Description	Boutique Hotel (60 rooms) "The Hotel Elkhart" at the Cornerstone Building - room count is based on market study Potential for 50 apartments Also a mixed-use potential with other sections of the building Partner with art institute to use hotel as a venue to display 30,000 SF between 2nd and 3rd floors vacant; upper floors of the building currently residential. 9th floor is a ballroom
	Project Location	500 South Main Street, Elkhart IN 46516-Elkhart County
	Project Category	Redevelopment of physical assets (e.g., blighted assets, infill, etc.)
	Industry Alignment	0
	Project Partners	Hotel Elkhart Apartments, LLC (Building owner) Hotel Developer (name withheld as requested) City of Elkhart Convention and Visitors Bureau Elkhart Corporate Community-Patrick Industries, Welch Packaging, Heritage Financial Group, THOR, Forest River, NIBCO
	Project Experience	ECCVB is the marketing agency for tourism and quality of life in Elkhart County specializing in the hospitality market Hotel Developer has developed 11 hotels and extensive contacts with all major hotel brands. Majority Builders did the renovation/construction of the Lerner Theatre project as well as other large historic renovation projects. Jim Kenley - Design professional who oversaw the Lerner Theatre renovation
Project Timeline	Project Start Date	8/1/2015
	Project End Date	12/31/2017
	Start within 12 months?	Yes
	Project Timeline	Market study already complete Site control established-July, 2015 Redevelopment/Site plan completed-November, 2015 Financing Committed-December, 2015 Bidding process completed-April, 2016 Construction Starts-May, 2016 Construction Completed-December, 2017
	Year 1 capital expenditures (\$)	\$1,550,000.00
	Year 2 capital expenditures (\$)	\$8,000,000.00
	Year 3 capital expenditures (\$)	\$2,000,000.00
	Year 4 capital expenditures (\$)	\$0.00



### Project Budget & Funding

<b>Year 5 capital expenditures (\$)</b>	\$0.00
<b>Total Capital Expenditures</b>	\$11,550,000.00
<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$0.00
<b>Total project budget</b>	\$11,550,000.00
<b>Description of Capital Expenditures</b>	Capital expenditures will consist of the renovation of the structure to include, but not limited to: Elevators, all major mechanical replacement, upfitting all corridors, new windows throughout, cosmetic restoration to ballroom, cosmetic improvements to commercial areas on 1st floor, improved access to rear parking deck. Year 1 = Redevelopment Plan (\$50,000) & Acquisition (\$1,500,000) Year 2 = Construction and restoration (\$8,000,000) Year 3 = Construction and restoration (\$2,000,000)
<b>Description of Ongoing Expenditures</b>	This nearly century old structure will see new life through the improvements in the renovation but will require a significant replacement reserve for all aspects of the building-apartments, hotel rooms, commercial and common areas. Cash flow from operations must be sufficient to provide for a higher-than-average replacement reserve. Continued reinvestment must be made to keep the property competitive in the hospitality and apartment market.
<b>Local public funding</b>	\$1,560,000.00
<b>Private funding</b>	\$8,156,250.00
<b>Non-profit funding</b>	\$0.00
<b>Other funding</b>	\$0.00
<b>RCI funding required?</b>	Yes
<b>RCI funding needed</b>	\$1,846,000.00
<b>RCI funding proportion of cap ex</b>	16%
<b>Total private funds</b>	\$8,156,250.00
<b>Private ratio calc</b>	71
<b>Total public funds</b>	\$3,406,000.00
<b>Public ratio calc</b>	29
<b>Other</b>	\$0.00
<b>Other ratio calc</b>	0
<b>Total funding</b>	\$11,562,250.00
<b>Variance between budget &amp; funding</b>	\$12,250.00
<b>Private/public/other funding ratio</b>	71 / 29 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	While downtown Elkhart has continued to increase the number and quality of rental housing units there is an obvious gap in the lack of any overnight lodging in the downtown. We have dozens of events and festivals that bring in 1000's of visitors interested in what downtown has to offer. Unfortunately, after these events are over, they must return to the more predictable forms of overnight lodging offered in the hotels along the Toll Road exit. A downtown boutique hotel would offer a completely unique experience through our festivals, independently owned restaurants an capped with a stay in an historic, boutique hotel. The Crystal Ballroom located in the Cook Cup Award-winning Lerner Theatre, hosts 200 events per year with large weddings nearly ever single weekend throughout the year. These 300+ person events will be a consistent generator of room nights along with the Athenian Ballroom, an event space located in the top floor of the Hotel Elkhart. Elkhart also has a huge number of corporations including the corporate HQ for companies like NIBCO, Patrick Industries, THOR, Forest River and Welch Packaging. These companies have indicated an interest in supporting a downtown hotel. The City of Elkhart adopted the SoMa (Supporting our Main Assets) plan in 2014.
	<b>Anticipated return on investment (%)</b>	166
	<b>Description of anticipated return on investment</b>	The ROI based on a state investment of \$1,846,000 and a total tax generation of \$3,071,846 over 10 years is 166% over 10 years or 16% per year. Property taxes-\$950,906 (this assumes 10 year tax abatement provided by City of Elkhart) Inn Keeper Tax-\$465,300 (5% of hotel gross income) Sales taxes-\$1,655,640 (7% on 60% occupancy assuming hotel guests spending \$120 per day 1.5 persons per occ. Room) Total Revenue-\$3,071,846 (over 10 years)
	<b>Annual sales or other non-tax revenue generated (\$)</b>	0
	<b>Description of annual sales or other non-tax revenue generated</b>	N/A
	<b>Jobs created (if applicable)</b>	42
	<b>Description of jobs created (if applicable)</b>	Hotel-management, administrative, bookkeeping, maintenance, house keeping, food service Apartments-Property management, maintenance, security Ballroom-Administrative, food service, wait staff



## Project #22 - Goshen Theater Restoration

Project Information	
<b>Project Contact</b>	Gina Leichty, GTI Board President
<b>Project Description</b>	<p>Goshen Theater Restoration Project</p> <p>From 1907–1986, the Goshen Theater, a 750-seat historic performing-arts theater, held its own as the showpiece of Goshen's entertainment and shopping district. In 1986, the theater was forced to close and was sold to a church. The building has since suffered decay, water damage, historic façade removal, and unresolved maintenance needs.</p> <p>Concerned stakeholders took notice and formed Goshen Theater, Inc. ("GTI."). In 2012, the organization commissioned a yearlong study to determine the feasibility of restoring the building, document existing mechanical, electrical, plumbing, structural and theatrical systems. In addition, they also conducted a market analysis to determine the best use of a restored theater.</p> <p>Based on information gathered in the feasibility study, the GTI board purchased the building in June 2014 and is presently seeking funding to fully renovate the facility.</p> <p>--</p> <p>Revitalization of the theater is more about the future than the past. GTI's intent is to rehabilitate and give the facility new purpose saving the community's shared heritage and bringing new life to the region.</p> <p>GTI goals in restoring the historic cultural amenity include 1) Providing a source of culture and entertainment for the community, 2) Bolstering the economic activity of the downtown and region as a whole.</p>
<b>Project Location</b>	216 South Main Street, Goshen, Elkhart County
<b>Project Category</b>	Cultural amenities
<b>Industry Alignment</b>	Entertainment
<b>Project Partners</b>	<p>This project is a public-private partnership with the support of critical stakeholders at the highest level of non-profit leadership. Partners and Sponsors include:</p> <ol style="list-style-type: none"> <li>1. Art House (Independent Film Studio)</li> <li>2. New World Arts (Acting Company)</li> <li>3. GoProv (Improv Acting Company)</li> <li>4. Goshen Community Schools (Theater Department)</li> <li>5. Dance in the City (Goshen Parks Dance Program)</li> <li>6. Downtown Goshen, Inc. (Main Street Organization)</li> <li>7. Elkhart County Convention and Visitors Bureau</li> <li>8. Goshen Chamber of Commerce</li> <li>9. City of Goshen</li> <li>10. Goshen Redevelopment Commission</li> <li>11. Elkhart County Community Foundation</li> <li>12. Indiana Department of Natural Resources, Department of Historic Preservation</li> </ol>
<b>Project Experience</b>	The GTI team is comprised of city and community leaders who have been involved in other similar redevelopment infrastructure projects. At least four leaders of the executive board were involved in the successful restoration of the ELCO/ Lerner theater in downtown Elkhart. Others led creation of the Elkhart Riverwalk, Hawks Artist and Entrepreneur live-work facility in Goshen, and Wellfield Botanical Gardens in Elkhart.



Project Timeline	Project Start Date	1/1/2016
	Project End Date	7/1/2017
	Start within 12 months?	Yes
	Project Timeline	Select Architect Prepare Construction Plans Solicit Bids Construct Improvements

Project Budget & Funding	Year 1 capital expenditures (\$)	\$12,500,000.00
	Year 2 capital expenditures (\$)	\$0.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$12,500,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$2,500,000.00
	Total project budget	\$15,000,000.00
	Description of Capital Expenditures	of Goshen. Includes fund for annual capital improvements estimated at \$94,000 starting at year 5 of operation
	Description of Ongoing Expenditures	Endowment Needed to fund Capital Replacements and Operations
	Local public funding	\$4,000,000.00
	Private funding	\$3,000,000.00
	Non-profit funding	\$4,000,000.00
	Other funding	\$1,500,000.00
	RCI funding required?	Yes
	RCI funding needed	\$2,500,000.00
	RCI funding proportion of cap ex	20%
	Total private funds	\$7,000,000.00
	Private ratio calc	47
	Total public funds	\$6,500,000.00
	Public ratio calc	43
	Other	\$1,500,000.00
	Other ratio calc	10
	Total funding	\$15,000,000.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	47 / 43 / 10



Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>Historic theater restoration is so widely recognized as a catalyst for economic activity that it is often a lead project in a comprehensive plan to revitalize a central business district.</p> <p>City planners, local governments and private businesses recognize the valuable connection between planning, economic development, and arts and culture. Concentrating creativity through both physical density and human capital enhances economic development. By locating firms, artists and cultural facilities together, a multiplier effect can result.</p> <p>While many cities lead with a theater, Goshen's historic theater is one of the largest unresolved projects in its commercial core. It stands vacant in the heart of the county seat, deteriorating while the community determines whether it will repurpose or condemn the facility.</p> <p>GTI is not content to stand by and wait for the building to implode or for the facility to be so physically compromised that a wrecking ball is the only logical solution. It is taking action. We see the theater as one of the greatest potential assets in our community and a strong catalyst for economic activity in region.</p> <p>In Goshen, fifteen years of grass roots initiatives coupled with public-private partnerships have restored significant activity to Goshen's central historic district. While investment in our central business districts is on the rise, we have not yet reached the goal of securing stability for smart new businesses and a diverse local economy. Local and independently owned businesses still face many competing forces. Manufacturing continues to define both the economic and cultural landscape of the Elkhart County community; posing inherent challenges to attracting and retaining much needed talent in the community.</p> <p>A restored Goshen Theater serves as a multiplier, bringing activity to the city center, offering jobs, enhancing the city's creative vitality and securing Elkhart County's reputation as a community that values culture.</p>
	<b>Anticipated return on investment (%)</b>	0
	<b>Description of anticipated return on investment</b>	<p>project will cover construction costs as well as operational, replacement, and maintenance needs into perpetuity. The overall anticipated project impact will be measured in terms of the successful restoration and revitalization of a historic community structure, and the provision of ancillary economic benefits to the city center. To the extent that there are excess profits, we would reduce the need for the capital endowment.</p> <p>The venue will accommodate a variety of uses. Conversations with promoters and potential users as well as an analysis of most recent facility activity suggest the Goshen Theater could host at least 150 events annually.</p> <p><b>2-YEAR INTERIM OPERATION</b></p> <ul style="list-style-type: none"> <li>• 24 Concerts – GTI, Ignition, 91.1 Globe</li> <li>• 12 Theater Performances – New World Arts, Goshen High School</li> <li>• 24 Dance Class Weeks</li> <li>• 12 Comedy Performances - GoProv Improv</li> <li>• 8 Dance Recitals</li> <li>• 24 Festivals - First Fridays Events</li> <li>• 104 Films - Art House</li> <li>• Other Public Events</li> <li>• 104 Church Meetings: Downtown@808</li> <li>• Daily Use: Gus' Lil Orbits donut shop</li> <li>• Daily Use: BoHo Pretty clothing boutique</li> </ul> <p>Based on projected utilization and attendance estimates for and projected frequency of use, we estimate approximately 30,000 visitors to the space during the Interim Operation Period.</p> <p><b>DIRECT BENEFICIARIES</b> include those organizations who will be sharing / renting space from the Goshen theater listed above, their audience, and family members. Additionally, the building project and Interim Operations will create new jobs in the community.</p> <p><b>INDIRECT BENEFICIARIES</b></p> <p>Goshen Theater events should provide a significant economic boost for existing downtown business establishments, contributing to their viability. In addition, these events provide a high-impact "Quality of Place" marketing tool for the City of Goshen, Chamber of Commerce, Elkhart County Visitors Bureau, Elkhart Development Corporation and ECCF as they seek to attract and retain talent to contribute to the County's</p>
	<b>Annual sales or other non-tax revenue generated (\$)</b>	\$250,000.00



	<b>Description of annual sales or other non-tax revenue generated</b>	Earned Revenues Rental Income Chargebacks & Cost Recovery Retail (Net Revenues) Box Office & Facility Fees Support & Funding Sponsorships & Events
	<b>Jobs created (if applicable)</b>	5
	<b>Description of jobs created (if applicable)</b>	Director Production Manager House Manager (Hourly) Box Office (Hourly) Custodian (Part time)



## Project #23 - Community Natatorium &amp; Fitness Center

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Peter McCown
	Project Description	Community Natatorium and Fitness Center  Plans have been developed to construct a \$30 million community center in downtown Elkhart. Key elements of this facility involve a fitness and wellness area, community gathering space, offices for local NPO organizations, and a regional natatorium for aquatic competition, recreation and physical therapy. Studies by experts in the field of aquatics indicate the viability of a regional natatorium that will draw event participants from a radius of more than 200 miles for swim competitions. The intent is to create a "destination" facility for the Midwest (Indiana, Illinois, Ohio, Wisconsin and Michigan) while at the same time creating a wellness, fitness and community center for our local citizens.
	Project Location	Downtown Elkhart
	Project Category	Quality of place
	Industry Alignment	Health and Recreation
	Project Partners	Beacon Health System Elkhart Community Schools City of Elkhart Elkhart County Community Foundation Elkhart Youth and Community Center
	Project Experience	The Elkhart Youth and Community Center has a 45 history of owning and running a fitness and community facility.  Beacon Health System owns and operates a number of wellness facilities.  The Elkhart Community Schools has many years of experience managing school based pools.  The Elkhart County Community Foundation has 26 years of experience partnering with various NPOs on capital projects benefiting the community.  The City of Elkhart is well experienced in managing major redevelopment and capital projects.
Project Timeline	Project Start Date	8/1/2014
	Project End Date	12/31/2016
	Start within 12 months?	Yes
	Project Timeline	The project collaborators have conceptual plans and are actively programming the facility. Private philanthropists are engaged in conversation as well. The current timeline target is to begin initial site work and construction in the spring of 2016.



Project Budget & Funding	Year 1 capital expenditures (\$)	\$0.00
	Year 2 capital expenditures (\$)	\$32,000,000.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$32,000,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$3,300,000.00
	Total project budget	\$35,300,000.00
	Description of Capital Expenditures	Total cost of the facility is estimated at \$32,000,000
	Description of Ongoing Expenditures	The annual operating budget of the Community Center is estimated at \$3,300,000.
	Local public funding	\$6,000,000.00
	Private funding	\$3,000,000.00
	Non-profit funding	\$17,000,000.00
	Other funding	\$0.00
	RCI funding required?	Yes
	RCI funding needed	\$6,000,000.00
	RCI funding proportion of cap ex	19%
	Total private funds	\$20,000,000.00
	Private ratio calc	63
	Total public funds	\$12,000,000.00
	Public ratio calc	38
	Other	\$0.00
	Other ratio calc	0
	Total funding	\$32,000,000.00
	Variance between budget & funding	(\$3,300,000.00)
	Private/public/other funding ratio	63 / 38 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	The collaborators in this project have been working together since the fall of 2014 to develop plans to construct a \$30 million community center in downtown Elkhart. Key elements of this facility involve a fitness and wellness area, community gathering space, offices for local NPO organizations, and a regional natatorium for aquatic competition, recreation and physical therapy. Studies by experts in the field of aquatics indicate the viability of a regional natatorium that will draw event participants from a radius of more than 200 miles for swim competitions. The intent is to create a "destination" facility for the Midwest (Indiana, Illinois, Ohio, Wisconsin and Michigan) while at the same time creating a wellness, fitness and community center for our local citizens.
	<b>Anticipated return on investment (%)</b>	\$633,500.00
	<b>Description of anticipated return on investment</b>	The ROI on this project can be measured by a number of different factors.  1. Community Health and Wellness 2. Economic Impact and multiplier effect of tourism 3. Downtown revitalization 4. Increased property values in surrounding neighborhoods 5. Job creation (construction and permanent facility staffing)
	<b>Annual sales or other non-tax revenue generated (\$)</b>	\$2,900,000.00
	<b>Description of annual sales or other non-tax revenue generated</b>	Annual revenues related to Aquatics, Health Club and Community Center Combined are estimated at \$2,900,000. Annual sales for Aquatics are estimated at \$900,000 year one. The Health Club is estimated to bring in \$1,500,000 in revenues. Physical Therapy and Other Community Activities add another \$100,000 per year. Endowment revenues of \$400,000 are planned for the total of \$2,900,000. The regional event forum of the natatorium is expected to generate more than \$250,000 each year in revenues from non-local visitors. These are projected facility rental and gate revenues from the facility. With a multiplier estimate of 10X spending in local hotels, restaurants, grocery stores, retail shops, bars and gas stations we project \$2,500,000 of increased spending in the local community which results in approximately \$175,000 in increased tax revenue.
	<b>Jobs created (if applicable)</b>	41
	<b>Description of jobs created (if applicable)</b>	Program and facility staff.



## Project #24 - Field Sports Complex

Project Ownership, Partners & Experience (Project Type & Readiness)	Project Information	
	Project Contact	Mike Huber
	Project Description	Elkhart Field Sports Complex
		The Regional Cities Initiative is built on the idea of creating Innovation Zones that spur creative solutions to community issues. Innovation Zone is downtown Elkhart. The City has developed a plan to move forward with local and regional partners in establish community with downtown as the center of that Blue Zone. This is our innovative solution to our community’s needs today and is built around 9 key concepts that stimulate healthy, active and engaged residents that live full lives and enjoy personal succe the success of their community.
		The City has been moving towards creating this vision for a healthy and satisfied Elkhart for many years. The Downtown Red of over 2 years of planning and public engagement through the SoMa (Supporting our Main assets) initiative. This plan was d of over 200 community members, civic leaders and business representatives that created the vision for Elkhart moving forward. Plan formalizes that initiative into actions and projects that will continue the success of downtown redevelopment efforts over ti downtown Elkhart into the neighborhoods surrounding Main Street. The SoMa initiative clearly illustrated that downtown is the creating a vibrant and active downtown we can transform our community.
		The development of the proposed project will transform downtown Elkhart into a vibrant, full service, city center by providing th recreation, residential and commercial amenities the community has envisioned for a successful downtown and make a bold s Elkhart Blue Zone.
		The Blue Zone project will transform this area into an active, healthy and community-oriented neighborhood that takes advanta the RiverWalk, sports fields, city parks, and existing health and wellness oriented businesses. The project includes the repurp development of new residential units, development of a new community health facility, and the establishment of a sports cente fields. A key component Blue Zone Development, the Sports Field Complex will include creating 6 public outdoor multi-use sp championship field venue that would support the private development of an indoor sports complex that will accommodate both new hotel to serve the complex and downtown demand. This development will complement existing sports fields at Elkhart Ce Soccer Complex to create a density of facilities that will serve local youth sports groups, expand Elkhart schools sports offering travel tournament opportunities. Link to project graphic: <a href="http://bit.ly/1cast02">http://bit.ly/1cast02</a>
	Project Location	Downtown Elkhart - Riverwalk District: E Jackson Blvd & Easy Shopping North
	Project Category	Quality of place
	Industry Alignment	Sports & Recreation, Hospitality and Retail
Project Partners	Elkhart County CVB City of Elkhart Parks and Recreation Elkhart Community Schools Local Sports Complex Development/Management Entity Elkhart County Community Foundation	
Project Experience	<p>The Elkhart County CVB, in partnership with the City of Elkhart Redevelopment Commission, facilitated a feasibility and marke proposed field sports complex development. This process helped identify local sports organization partners in the best positio development of the Sports Field Complex – including Indiana Rugby, Elkhart Flames Soccer Club and FC Indiana.</p> <p>Elkhart Community Schools is investing in the development of new sport opportunities for students (including lacrosse), and re class facilities as a tool to attract new students. The field sports complex would allow them to be a partner in new facility develk their own.</p> <p>Elkhart Parks &amp; Recreation currently operates existing soccer and softball facilities, and brings this experience to the project. I looking at management and operation partnerships for the outdoor fields as a potential new revenue stream for Parks. Local facility development and operating companies are being engaged as a part of the project.</p> <p>There are 2-3 local facility operators in the market area who will be engaged to bring private development and management su development. In addition, their are 2-3 local hotel developers who have interest in the construction of an 80 room hotel to supp</p> <p>The Elkhart County Community Foundation has identified Youth Activities and Vibrant Communities as 2 of its pillars for invest the ECCF will be sought as part of the project financing.</p>	



Project Timeline	Project Start Date	1/1/2016
	Project End Date	12/1/2018
	Start within 12 months?	Yes
	Project Timeline	<p>The dates outlined are based on approval of funding in fall 2015.</p> <p>Phase 1 of the project includes the acquisition of property and construction of the 2 turf and 2 grass soccer/lacrosse fields and addition, Phase 1 includes partial land acquisition of the commercial property related to development of the Indoor facility and fields behind the Natatorium project could begin in conjunction with the construction of that facility. Property acquisition is expected a partner in the Natatorium project as well. It is anticipated that construction of the fields (including lights) would be completed Other Phase 1 acquisition activities should take approximately 6 months from project start date, with construction of grass field completed within 18 months from the start date.</p> <p>Phase 2 of the project completes acquisition of property to support the indoor facility and championship field, along with construction of both of these facilities. Complete property acquisition activities to support Phase 2 should be completed within 18 months of project start date that multiple residential properties are involved in acquisition activities. While acquisition activities are being completed, development of operation/management company would be selected, and project financing would be finalized. Construction of indoor facility and championship field would take approximately 18 months from completion of property acquisition.</p> <p>Phase 3 of the project includes the acquisition of property and construction of the remaining grass rugby field and linkage to the stadium. Property acquisition would begin in conjunction with development of riverfront/marina project – relocation of existing business is involved in the project based on business relocation timetable. Construction would complete within 1 year of property acquisition.</p>

Project Budget & Funding	Year 1 capital expenditures (\$)	\$3,500,000.00
	Year 2 capital expenditures (\$)	\$24,600,000.00
	Year 3 capital expenditures (\$)	\$1,250,000.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$29,350,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$1,550,000.00
	Total project budget	\$30,900,000.00
	Description of Capital Expenditures	<p>Year 1 \$500,000 - Phase 1 Acquisition of property \$500,000 - Phase 2 Acquisition of property \$2,500,000 - Construction of the 2 turf and 2 grass soccer/lacrosse fields and supportive parking areas</p> <p>Year 2 \$600,000 - Phase 2 Acquisition of Property \$18,000,000 - Construction of Indoor facility and hotel \$6,000,000 - Championship Field and supportive parking</p> <p>Year 3 \$500,000 - Phase 3 Acquisition \$750,000 - Construction of final grass field</p>
	Description of Ongoing Expenditures	<p>These operating expenses represent all 3 phases of the completed project. Staff would be hired by local management/operation and be responsible for programming all aspects of the project.</p> <p>Salaries &amp; Benefits - \$360,000 Seasonal Staff - \$130,000 Utilities - \$300,000 Maintenance - \$220,000 Security - \$110,000 Insurance - \$170,000 General Admin/Marketing - \$210,000 Capital Reserve - \$50,000</p>
	Local public funding	\$5,350,000.00
	Private funding	\$18,000,000.00



<b>Non-profit funding</b>	\$2,000,000.00
<b>Other funding</b>	\$0.00
<b>State funding required?</b>	Yes
<b>State funding needed</b>	\$4,000,000.00
<b>State funding proportion of cap ex</b>	14%
<b>Total funding</b>	\$29,350,000.00
<b>Variance between budget &amp; funding</b>	(\$1,550,000.00)
<b>Private/public/other funding ratio</b>	68 / 32 / 0

Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>The Elkhart Field Sports Complex is being proposed as a part of a complete new vision for Downtown Elkhart's Riverwalk District as a Blue Zone centered recreation facilities that will not only meet local needs, but serve as an attraction for regional travel sports opportunities. The Field Sports Complex will be a Community Wellness Center &amp; Natatorium, along with a new Marina/River Access development to transform the part of the Riverwalk District North of East Jackson Blvd. The development of floodway issues that limit redevelopment opportunities for large pieces of the real estate in this district.</p> <p>The Elkhart County CCVB facilitated a feasibility and market analysis that supports the proposed field sports complex development based on identified strengths enhancing/complementing existing facilities and events. Specifically, the Sports Field Complex will bring together the City of Elkhart Parks and Recreation Schools, and local sports organizations including Indiana Rugby, FC Indiana Soccer, and Elkhart Flames Soccer in the expansion of activities that can be offered. Community Schools have expressed an interest in expanding sports offerings for ECS students (new sports such as lacrosse &amp; rugby) and recognize the complex as a tool to attract new students to the school district. Indiana Rugby currently operates a rugby specific facility on the north side of Elkhart that attracts many tournaments and camps throughout the year – the additional assets developed as a part of the Sports Field Complex will give them the ability to expand the number of months they can play and train, further consolidating Elkhart's reputation as a premier rugby destination. The Elkhart Flames travel soccer club currently hosts events they host. Finally, FC Indiana has expressed an interest in locating their Men's and Women's professional soccer teams at the proposed Sports Field Complex and has successfully hosted state level travel soccer events – the proximity of the new Sports Field Complex will allow them to considerably upgrade events they host. Finally, FC Indiana has expressed an interest in locating their Men's and Women's professional soccer teams at the proposed Sports Field Complex. Shek Borkowski is also the current Head Coach of the Haiti Women's National Team that would have its base of operations in Elkhart as they train and participate in competitions such as the World Cup. The proposed Indoor Complex will meet identified demand for indoor soccer/lacrosse/rugby, in addition to a growing number of existing sports and fitness centers are being actively engaged to identify private development and operations management of the indoor complex.</p> <p>This cluster of facilities will be unique within the Northern Indiana region, offering state of the art facilities to support swimming/diving, soccer, lacrosse, rugby, indoor turf, and paddling/rowing and other river related activities. This development will be a significant tool for both the City and the Elkhart Community Schools. The foundation of the success of these facilities relates directly to serving the needs of local residents and local sports organizations. In addition, the facilities greatly enhances the ability of the community to host travel sports events and activities. The activities generated at these new facilities will serve millions of dollars of visitor spending to Elkhart. Elkhart has a strong base of local hotels and restaurants that will all benefit significantly from the increase in visitor spending.</p> <p>Finally, the development of the sports and recreation facilities on the north side of East Jackson Blvd, will directly support the City's identified plans for redeveloping the Riverwalk District on the south side of East Jackson Blvd and in Downtown Elkhart. The City of Elkhart is actively working with housing and retail development for the property immediately South of the Sports Field Complex. The hotel portion of this project is anticipated to be located within the portion of East Jackson Boulevard to continue support of the redevelopment plan. The development of the sports and recreation facilities will help to minimize the risks associated with development, and should result in limiting the City's financial participation in the associated redevelopment activities.</p> <p>This project falls in line with the following Community Plans: City of Elkhart Downtown TIF Plan SoMa Downtown Revitalization Plan Elkhart County CCVB Tourism Development Plan</p>							
	<b>Anticipated return on investment (%)</b>	45							
	<b>Description of anticipated return on investment</b>	<p>Public Sector Investment (local &amp; state) in this project is anticipated to be just over \$9 mil. This includes investment from the City of Elkhart and the Elkhart Community Schools.</p> <p>This investment will leverage \$2 million from the ECCF, and \$10 in private financing to construct the indoor facility. In addition, the mixed use development south of Jackson Blvd that will create another \$8 mil in private investment.</p> <p>\$9 mil public / \$20 mil Foundation &amp; Private = 45% return</p> <p>In addition, the sports complex will generate approximately 35,000 room nights annually. ECCVB research indicates lodging visitor spending per day - sports travel generates an average of 2 persons per room per night.</p> <p>35,000 room nights X 2 per room X \$96 = \$6.7 million in visitor spending annually</p>							
	<b>Annual sales or other non-tax revenue generated (\$)</b>	2850000							
	<b>Description of annual sales or other non-tax revenue generated</b>	<table><tr><td>Sports Complex</td><td>Hotel</td></tr><tr><td>\$1,200,000 Rental Fees</td><td>\$1,300,000 Annual Revenue (80 Rooms x \$45 RevPAR)</td></tr><tr><td>\$125,000 Net Concessions</td><td></td></tr><tr><td>\$225,000 Advertising/Sponsorship</td><td></td></tr></table>	Sports Complex	Hotel	\$1,200,000 Rental Fees	\$1,300,000 Annual Revenue (80 Rooms x \$45 RevPAR)	\$125,000 Net Concessions		\$225,000 Advertising/Sponsorship
Sports Complex	Hotel								
\$1,200,000 Rental Fees	\$1,300,000 Annual Revenue (80 Rooms x \$45 RevPAR)								
\$125,000 Net Concessions									
\$225,000 Advertising/Sponsorship									



<b>Jobs created (if applicable)</b>	Sports Complex – 8 Hotel – 10 FTE	
<b>Description of jobs created (if applicable)</b>	Sports Complex Director (1) - \$65,000 Exec Assistant (1) - \$30,000 Event Operations Manager (1) - \$45,000 Event Services Coordinator (1) - \$35,000 Sports Marketing Coordinator (1) - \$40,000 Grounds/Maintenance (3) - \$105,000	Hotel General Manager (1) - \$50,000 Assistant Manager (2) - \$60,000 Front Desk Staff (2 fte) - \$60,000 Maintenance (1) - \$30,000 Housekeeping (4 fte) - \$90,000



## Project #25 - Goshen Amphitheater

Project Information	
<b>Project Contact</b>	Becky Hershberger, Goshen Redevelopment
<b>Project Description</b>	<p>Goshen Amphitheater Project</p> <p>As the final piece of the River Race Area redevelopment, the City of Goshen and Goshen Redevelopment Commission are planning to construct an open-air amphitheater on the west side of the Millrace Canal. The site is currently 9-acres of greenspace adjacent to the City's greenway and blocks from historic downtown Goshen. As the draw to downtown Goshen continues to grow, the opportunity for an outdoor venue to host events is the next logical step.</p> <p>The idea is to maintain a natural feel with an open stage and seating in the grass. The community desires to see this space remain a "public space". This type of venue would allow for the site to remain accessible to the community as well as draw more people to the property. Its proximity to trails and downtown make it a walkable destination for many and allow for us to showcase this valuable property in a way to enhance Goshen, attract visitors and provide an amenity that is currently lacking in Goshen.</p>
<b>Project Location</b>	311 W. Madison Street, Goshen, Elkhart County
<b>Project Category</b>	Cultural amenities
<b>Industry Alignment</b>	0
<b>Project Partners</b>	<p>City of Goshen/Goshen Redevelopment Commission</p> <p>Private Donors</p> <p>Downtown Goshen, Inc. (DGI)</p> <p>Elkhart County Convention Visitors Bureau</p> <p>State of Indiana (Regional Cities Program)</p>
<b>Project Experience</b>	<p>The City of Goshen has been working to redevelopment the Millrace Canal corridor for nearly 20 years. Many members of the community, including the City, the Goshen Redevelopment Commission, Chamber of Commerce and countless community members, have worked together to create a vision for the area. To date, the City has acquired nearly 22 acres of former industrial land, deconstructed several of the old buildings and successfully achieved environmental closure of the land to allow for redevelopment. Just under \$3,000,000 in grants and loans from the USEPA and Indiana Finance Authority were utilized to successfully complete these projects in this area. The funds leveraged by the City have led to nearly \$18,500,000 in private investment for this corridor to date.</p> <p>The plan is to couple the City's construction and project implementation expertise with the event planning and marketing skills of Downtown Goshen, Inc. and the Elkhart County Convention Visitor's Bureau (CVB) for this project. While the City has the knowledge on the construction side, the other two entities are skilled in managing and attracting people in to make the venue a success.</p>
<b>Project Ownership, Partners &amp; Experience (Project Type &amp; Readiness)</b>	
<b>Project Start Date</b>	9/1/2015
<b>Project End Date</b>	10/31/2016
<b>Start within 12 months?</b>	Yes



Project Timeline	<b>Project Timeline</b>	<p>It is anticipated that the planning and design for the project will begin this fall. The project will be administered by the Goshen Redevelopment Commission with participation from the other project partners. A design consultant will be procured to complete all planning, permitting and to prepare construction documents to allow for the project to go out for bid. A six-month design process for this project is anticipated.</p> <p>The goal is to have the project out for bid early 2016. This would allow for a full construction season to complete the amphitheater. Through remediation projects on the west side of the canal, it was discovered that there is a layer of peat material that exists at depths of nearly 20' and special geotechnical considerations are anticipated to be required for the site. Upgrades to the sewer and water infrastructure in the area will need to be made to adequately serve the new venue.</p> <p>Completion of the project by early fall would allow for stabilization of the green space during optimal planting season. As this is the final step of the project, the hope is that the first events could be held at the project site before the end of 2016.</p>

Project Budget & Funding	<b>Year 1 capital expenditures (\$)</b>	\$50,000.00
	<b>Year 2 capital expenditures (\$)</b>	\$1,200,000.00
	<b>Year 3 capital expenditures (\$)</b>	\$0.00
	<b>Year 4 capital expenditures (\$)</b>	\$0.00
	<b>Year 5 capital expenditures (\$)</b>	\$0.00
	<b>Total Capital Expenditures</b>	\$1,250,000.00
	<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$20,000.00
	<b>Total project budget</b>	\$1,270,000.00
	<b>Description of Capital Expenditures</b>	<p>The City of Valparaiso constructed an amphitheater very similar to what is envisioned for Goshen at a cost of \$850,000. Cost estimates are based off of their project costs and include contingencies for infrastructure and geotechnical needs for this particular site.</p> <p>Cost estimate breakdown:</p> <ul style="list-style-type: none"> <li>- Design Costs - \$50,000</li> <li>- Construction Costs for the Amphitheater (including site restoration) - \$1,000,000</li> <li>- Infrastructure Improvements (Water/Sewer/Electric/Gas Extensions) - \$200,000</li> </ul>
	<b>Description of Ongoing Expenditures</b>	It is anticipated that annual expenses for this project would not exceed \$20,000. Costs include utility costs to operate the facility, employee costs associated with maintaining the facility and event staffing and the ongoing marketing of the events.
	<b>Local public funding</b>	\$250,000.00
	<b>Private funding</b>	\$770,000.00
	<b>Non-profit funding</b>	\$0.00
	<b>Other funding</b>	\$0.00
	<b>RCI funding required?</b>	Yes
	<b>RCI funding needed</b>	\$250,000.00



<b>RCI funding proportion of cap ex</b>	20%
<b>Total private funds</b>	\$770,000.00
<b>Private ratio calc</b>	61
<b>Total public funds</b>	\$500,000.00
<b>Public ratio calc</b>	39
<b>Other</b>	\$0.00
<b>Other ratio calc</b>	0
<b>Total funding</b>	\$1,270,000.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	61 / 39 / 0

<b>Project impact and alignment with local or regional plans</b>	<p>Goshen has worked for years to bring life back to the downtown and now boasts one of the most vibrant historic downtowns in Indiana. The First Fridays initiative has been in place for 8 years and attracts hundreds to the downtown area on a monthly basis. Nearly every store front is occupied with thriving businesses and restaurants and downtown Goshen has become a destination. In addition, the tech community within downtown Goshen is growing and thriving. The City also boasts an extensive greenway adjacent to the Millrace Canal that is cared for by the City's Parks Department. This project is a way to tie the two attractions together as it lies in the middle and a way to draw in both Goshen residents as well as visitors by providing a feature that does not currently exist within our community.</p> <p>2014 City of Goshen Comprehensive Plan "Develop cultural amenities in the downtown"</p> <p>2013 Elkhart County CVB Plan "Focus downtown development efforts on creating a sense of vibrancy and diversity in the downtown"</p> <p>2015 Goshen Downtown Plan "Develop a downtown amphitheater identified as a priority project"</p>
<b>Anticipated return on investment (%)</b>	\$258,250



### Project Impact

<b>Description of anticipated return on investment</b>	<p>It is estimated that the Goshen Amphitheater project will create a direct annual economic impact of \$258,250. This represents an annual return of 21.5% on the initial investment of \$1.2 million.</p> <p>The return on investment is based on the following assumptions:</p> <ul style="list-style-type: none"> <li>- Total of 25 events per season (June- September).</li> <li>- Average attendance per event of 200 people.</li> <li>- Facility rental fee of \$350.00.</li> <li>- Half of the attendees will be visitors, the other half local.</li> <li>- Average visitor spending (based on CVB estimates for lodging and retail) \$75 per event per person.</li> <li>- Average local retail spending \$25 per event per person.</li> </ul> <p>Annual revenue and spending estimate:</p> <ul style="list-style-type: none"> <li>- Facility rental income (\$350 x 25) \$8750</li> <li>- Visitor spending (\$75 x 2500) \$187,000</li> <li>- Local spending (\$25 x 2500) \$62,500</li> <li>----- Total \$258,250</li> </ul>
<b>Annual sales or other non-tax revenue generated (\$)</b>	250,000
<b>Description of annual sales or other non-tax revenue generated</b>	<p>Based on a sales tax rate of 7% and a total retail spending (local and visitor) of \$249,000, the sales tax revenue would be as follows:</p> <p>Visitor spending \$187,000 Local spending \$62,500 Total spending subject to sales tax \$249,000</p> <p>X 7%</p> <p>Total annual sales tax revenue \$17, 464</p>
<b>Jobs created (if applicable)</b>	1
<b>Description of jobs created (if applicable)</b>	<p>The Goshen Amphitheater project is expected to directly create one new FTE.</p> <p>The following positions will be created to manage the operations of the amphitheater:</p> <p>Maintenance .25 FTE Promotions/marketing .50 FTE Production/ tech manager .25 FTE TOTAL 1.0 FTE</p>



## Project #26 Exhibition Hall

Project Ownership, Partners & Experience (Project Type & Readiness)	Project Information	
	Project Contact	Barkley Garrett
	Project Description	Outdoor Entertainment and Exhibition Space: The project will include a hotel, convention center, office building, and stadium. One of the primary purposes of the event space is for horse auctions, they will also host events like tractor pulls, concerts, sporting events, conventions, etc. and they are making the space large enough to host RV rallies also.
	Project Location	Intersection of US 20 & CR17, Elkhart, Indiana
	Project Category	Quality of place
	Industry Alignment	Tourism
	Project Partners	Private developer Elkhart County Convention and Visitors Bureau: Promoting the venue Recreational Vehicle Association: As a frequent event host Manufactured Housing Institute: As a frequent event host City of Elkhart: Providing Utilities and Economic Development support
Project Time	Project Experience	The private group/developer also operates the Michiana Event Center in Howe, IN. ( <a href="http://michianaevents.com/">http://michianaevents.com/</a> ) so the project team would be experienced, and from what I understand well capitalized. The City is going to consider a tax abatement as their partnership on the project.

Project Time	Project Start Date	8/1/2015
	Project End Date	12/31/2016
	Start within 12 months?	Yes
	Project Timeline	2015: Finalize plans, purchase land 2016: Construction and opening of facility

Project Budget & Funding	Year 1 capital expenditures (\$)	\$33,000,000.00
	Year 2 capital expenditures (\$)	\$0.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$33,000,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$0.00
	Total project budget	\$33,000,000.00
	Description of Capital Expenditures	\$3M for land purchase, \$30M for new construction
	Description of Ongoing Expenditures	0. Will be absorbed by current operations
	Local public funding	\$2,064,860.00
	Private funding	\$28,870,280.00
	Non-profit funding	\$0.00
Project Budget & Funding	Other funding	\$0.00
	RCI funding required?	Yes



Project Budget & Funding

<b>RCI funding needed</b>	\$2,064,860.00
<b>RCI funding proportion of cap ex</b>	6%
<b>Total private funds</b>	\$28,870,280.00
<b>Private ratio calc</b>	87
<b>Total public funds</b>	\$4,129,720.00
<b>Public ratio calc</b>	13
<b>Other</b>	\$0.00
<b>Other ratio calc</b>	0
<b>Total funding</b>	\$33,000,000.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	87 / 13 / 0

Project Impact

<b>Project impact and alignment with local or regional plans</b>	This space will attract not only regional events but national and international events as demonstrated by the demand from potential customers for a larger venue with added amenities. This project would create a demand for increased economic development with a need for shopping, hotels and restaurants. In turn, all in the region would benefit with job creation at all economic levels and would serve as a catalyst for additional education, entertainment and tourism opportunities.
<b>Anticipated return on investment (%)</b>	100
<b>Description of anticipated return on investment</b>	The anticipated 100% ROI would be recouped by the event revenue increase and donations from proven sources in the support of an expanded event venue.
<b>Annual sales or other non-tax revenue generated (\$)</b>	-
<b>Description of annual sales or other non-tax revenue generated</b>	Anticipated events that would be held at the venue would support the increase in annual sales.
<b>Jobs created (if applicable)</b>	115
<b>Description of jobs created (if applicable)</b>	115 FTE jobs are planned for this facility, including administration, operations, sales & marketing, and hospitality roles with a minimum annual payroll of \$2.3M



## Project #27 Apex Climbing and Fitness

Project Ownership, Partners & Experience	<b>Project Information</b>	
	<b>Project Contact</b>	Michael L. Dickens
	<b>Project Description</b>	Description: As fitness enthusiasts and climbers for a combined 25+ years, we know that exercise can be fun, social, and accessible, yet Goshen currently has no year-round family-oriented fitness facility. The South Bend/Mishawaka areas have a small number of year-round family-oriented entertainment/fitness businesses, but none offering the diversity that climbing and climbing-related activities provide. Apex Climbing and Fitness strives to be the first full-featured indoor climbing facilities in the Michiana area, providing bouldering, top-rope, and lead climbing as core offerings. Over time we anticipate providing climbing-related activities such as a ropes challenge course, parkour, ninja warrior, Crossfit, basic cardio equipment, massage, yoga, after school programs, day camps for kids, and special events such as birthday parties and sleepovers. Once Apex is financed, we will form a non-profit foundation to provide sliding scale entry for low income families, and, especially, after-school and day camps for low income children. Our Foundation will apply for grants both nationally and locally, and use all grant money to allow those who need assistance most access to our world-class facilities. Our facilities will be community-oriented and family-oriented via our climbing options and numerous climbing-related offerings, providing year-round health, fitness, and entertainment options for all ages. Apex Climbing and Fitness will bring people together to achieve new heights.
	<b>Project Location</b>	Joseph County and in the Goshen area for Elkhart County. We are working with the City of Goshen Redevelopment Commission as well as local real estate agents to identify and acquire property, and then build-to-suit or lease and renovate a building that is of the dimensions necessary for a climbing facility: typically 40'-50' contiguous peak vertical space height over a 100'x50' floor footprint, with another 100'x50' floor footprint for offices, bathrooms, and rooms for climbing-related activities. Although we value reusing extant buildings, we recognize that it is unlikely that we will find such buildings available in desirable locations within either target area, and hence that we're more likely to acquire or lease property and build-to-suit.
	<b>Project Category</b>	Quality of place
	<b>Industry Alignment</b>	Recreation and Fitness
	<b>Project Partners</b>	Apex Climbing is currently in discussions with a variety of climbing-related businesses and individuals for both partnerships and sponsorships. Most relevant for this application are: (1) Body Evolution Fitness and Nutrition (South Bend, Indiana): A small, locally owned, St. Joseph County fitness oriented company with management experience, for a partnership where we will own the facility and they will manage it. (2) Evo Rock + Fitness (Concord, New Hampshire): A nationally recognized climbing facility owner and developer, for franchising and investment partnerships. (3) Climb Kalamazoo (Kalamazoo, Michigan): The nearest sizeable climbing gym to Northern Indiana, for sponsorship, investment, and mentoring. (4) MetroRock Climbing Centers (various locations in New England): A successful, established, and expanding climbing facility chain, for mentoring and investment. (5) City of Goshen Redevelopment Commission: For assistance obtaining property for our Goshen facility. Because indoor rock climbing is a new market to our part of the Michiana area, we are intentionally reaching out to both locally and nationally recognized businesses to gain diversity of franchising, partnerships, sponsorships, and investment opportunities.
	<b>Project Experience</b>	The Apex Climbing team has experience with local projects only -- managing a successful consulting business, and starting and running an Ultimate Frisbee League -- but plenty of experience and contacts in the climbing industry. Our team has been climbing for 25+ years in various areas of the United States, and we have an investor in various climbing facilities with insider information on finances and business operations. That said, by franchising with Evo Rock + Fitness, we gain access to a group with extensive experience in both developing and managing climbing facilities around the United States including one on the south side of Indianapolis.
	<b>Project Start Date</b>	6/1/2015
	<b>Project End Date</b>	5/31/2017
	<b>Start within 12 months?</b>	Yes



Project Timeline		We are looking at a single round of financing for both proposed facilities, rather than splitting fundraising into two distinct phases. Our business plan using just equity financing includes an expected yearly ROI of 15-20%, and support from various local and national networks. We anticipate that financing can be secured in 3-6 month's time via various means including the Notre Dame Irish Entrepreneurs Network.
		In parallel with securing financing, we will find appropriate property -- whether including an existing building/structure or not -- and sign purchase or lease agreements contingent on securing funding. We expect the total process of obtaining funding and property to take 6-9 months. If a building needs to be constructed rather than us repurposing an existing one, the construction is anticipated to take 6-9 months, some of which can be finished in parallel with the climbing wall and interior build-out designs listed below.
	Project Timeline	With financing secured and a building of appropriate size under agreement, it typically takes about 9 months to build a climbing facility -- barring delays due to unanticipated events. The first 3 months are for preparation: wall design, interior structure design, and so forth. The last 6 months are for completing climbing wall and interior build-out construction. During the final month, offices are set up, the main desk is outfitted, and retail is purchased for the store; as climbing walls are completed, climbs are put up for testing and wall evaluation.
		Building out two climbing facilities can be done in parallel with the preparation phase of the second gym overlapping with the construction phase of the first one. In this manner, we estimate that we can have both Apex Climbing and Fitness facilities up and operational within 15 months of starting.  Putting all the pieces together, we expect both projects to take roughly 2 years to be operational, executing as many parts in parallel as reasonably possible to reduce the total time from start to operations

Project Budget & Funding	Year 1 capital expenditures (\$)	\$2,000,000.00
	Year 2 capital expenditures (\$)	\$1,500,000.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$3,500,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$0.00
	Total project budget	\$3,500,000.00
	Description of Capital Expenditures	Capital expenditures for Apex Climbing and Fitness facilities includes funding needed: (1) to secure a long term lease (preferably lease-to-own) on, or purchase of, property, construction or renovation of a building of appropriate size and amenities; (2) to outfit the building space with all initial assets including climbing walls, holds, ropes, flooring, sound system, air conditioning and filtration system, and so forth; (3) to cover operating losses during the facility build-out such as monthly payments for insurance, property taxes, utilities, and mortgage, staff hiring and training and salaries before opening including benefits and payroll taxes, and all professional services including accountants and lawyers; (4) to cover operating losses during the first year of operations; and (5) to provide a small cash reserve for unanticipated start-up
	Description of Ongoing Expenditures	Based on the finances of other comparable climbing facilities, we expect each facility to be cash positive within 1 year of commencing operations, and from then on to be self-sustaining in terms of financial resources required for ongoing operations, maintenance, etc..
	Local public funding	\$300,000.00
	Private funding	\$2,500,000.00
	Non-profit funding	\$0.00
	Other funding	\$0.00
	RCI funding required?	Yes
	RCI funding needed	\$700,000.00
	RCI funding proportion of cap ex	20%
	Total private funds	\$2,500,000.00
	Private ratio calc	71
	Total public funds	\$1,000,000.00
	Public ratio calc	29



Other	\$0.00
Other ratio calc	0
Total funding	\$3,500,000.00
Variance between budget & funding	\$0.00
Private/public/other funding ratio	71 / 29 / 0

Project Impact	Project impact and alignment with local or regional plans	<p>Neither Apex Climbing and Fitness nor indoor climbing are specifically identified in any plan for St. Joseph or Elkhart County, nor for the cities of South Bend, Mishawaka, or Goshen. That said, the Comprehensive Plans for each of these counties or cities, as well as the goals of Elkhart Community Foundation, IU Health Goshen Foundation, and Community Foundation of St. Joseph County (among others), are well-aligned in multiple ways with our mission and values, including but not limited to the following areas:</p> <ul style="list-style-type: none"> <li>* Improving quality of life / place: Our mission is to provide accessible, fun, and social fitness, year round, to people of all ages and physical abilities. Apex Climbing and Fitness will bring people together to achieve new heights.</li> <li>* Diversifying the local economy: Goshen, in particular, is heavy on businesses in the construction and fabrication industries. A business providing year round family-oriented recreation and fitness is a significant change from other businesses in the Michiana area.</li> <li>* Supporting small, locally owned businesses: We anticipate making Apex a regional brand, known for providing world-class climbing facilities from South Bend to Fort Wayne. Each facility will typically employ 14-18 workers, and generate \$500k-\$700k in revenue yearly.</li> <li>* Encouraging business practices that have positive social impacts on the community: Apex is all about community, fitness, and fun, bringing people together and giving back to the local neighborhood, city, and region both as a business and as individuals.</li> <li>* Expanding recreational activities because they contribute to citizens' mental and physical health, promote economic development, and provide environmental benefits to the community: The Michiana region currently has no year-round indoor rock climbing business of any significant size. Indoor rock climbing in places with no natural outdoor climbing -- such as the Michiana area -- has become a viable market in the last 5 years, and yearly growth in the indoor rock climbing industry has averaged around 10% over the past 5 years. Apex strives to address this deficit by being the first to market and provide a full-featured facility with not just climbing but also many climbing-related fitness-oriented activities.</li> <li>* Promoting environmental education: Apex facilities will integrate environmental stewardship into our teaching and classes. Our businesses will participate in local trail creation and maintenance, teach "leave no trace" methods and ethics, and provide instruction on technique and etiquette for outdoor climbing and related outdoor activities. Instruction about environmental awareness will begin with kids at after-school and day camp activities, and continue through adults taking climbing lessons.</li> <li>* Encouraging sustainable living and business practices, development that is sensitive to the natural environment: Franchising through Evo Rock and Fitness (see project partners below) requires all new building structures to be LEED certified, using natural lighting where possible to reduce electric lighting requirements as well as constructing each facility to be highly energy efficient. Although such certification costs more up front, the owner is rewarded down the road with lower energy costs as well as lower building upkeep and maintenance costs. The rewards are worth the investment in terms of local, regional, and national environmental sensitivity.</li> <li>* Making alternative transportation (walking/biking) a community asset: In selecting property, Apex strives to build near public transportation and bike paths to allow for alternative transportation use. Each facility will provide protected parking for bicycles as part of the entryway, further encouraging customers to use biking as a means for coming to our facilities.</li> </ul>
	Anticipated return on investment (%)	17.5
	Description of anticipated return on investment	Based on the performance of other similarly-sized climbing facilities, we anticipate that the total average long-term yearly ROI will be 15-20%. Individually, the South Bend/Mishawaka facility is anticipated to provide a long-term yearly ROI of 20-25%, while the Goshen facility is anticipated to provide a long-term yearly ROI of 10-15%. The "average long-term yearly ROI" is then around 17.5%, calculated here by dividing the total cumulative \$ returned to investors by the product of the number of years since start-up and the total \$ invested. Hence, for example, obtaining \$1M in investment and returning to investors \$100k, \$150k, \$200k, \$250k, and \$300k for the first 5 years of operations results in yearly ROI of 10%, 12.5%, 15%, 17.5%, and 20% -- and, in this case, we say that the "average long-term yearly ROI" is 20%.
	Annual sales or other non-tax revenue generated (\$)	1000000
	Description of annual sales or other non-tax revenue generated	<p>Once each Apex facility is open for business, revenue will be generated by: (1) sales of day passes, memberships, and retail; (2) payments for instruction at our climbing school including a regularly-offered course introducing customers to climbing and belaying; and (3) payments for events such as birthday parties and overnights.</p> <p>The \$ number above represents the expected total revenue generated each year averaged over a 10 year period starting after opening. Because we are creating a new market in the Michiana area, we expect initial yearly revenues to start at around \$350k for the South Bend/Mishawaka facility and \$250k for the Goshen facility, and over a 10 year period increase to around \$750k and \$600k respectively. We anticipate revenue to increase rapidly in the first 5 years, then increase slowly until peak revenue is reached around year 10.</p>
	Jobs created (if applicable)	30



<p><b>Description of jobs created (if applicable)</b></p>	<p>We will need to hire workers to support both facilities, with the actual number depending on the facility size and offerings. When each facility is open, we will have 2 operations managers overseeing the facility, 2 workers on the main desk, 2-4 workers in the climbing areas to both provide climbing advice as well as monitor for safety, and another 1-3 workers performing maintenance such as cleaning bathrooms, dealing with trash, inspecting ropes and belay devices and reporting any findings to the manager. After-school and day camp specific staff will be typically 3-5 workers, each assigned up to 5 students; more will be hired if demand requires it.</p> <p>During off hours, we will need 4 workers to take down climbing routes, perform wall maintenance and cleaning, and set routes. Thus, the total staff requirements per facility will be 14-18 workers, depending on facility size, for a total of approximately 30 new jobs.</p>
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## Project #28 - IU South Bend HealthLinc Health and Wellness Center

Project Information	
Project Ownership, Partners & Experience (Project Type & Readiness)	<b>Project Contact</b>
	Terry L. Allison, Chancellor, Indiana University South Bend
	<b>Project Description</b>
	<p>Project Title: Indiana University South Bend/HealthLinc Health and Wellness Center</p> <p>The Trustees of Indiana University (on behalf of Indiana University South Bend), in partnership with HealthLinc, Inc., a federally funded provider of community health clinics in northern Indiana, proposes the renovation and expansion of an 11,250 square-foot community Health and Wellness Center (IUSB/HL HWC) to be located on the IU South Bend campus in the River Park neighborhood of South Bend. The IUSB/HL HWC would expand access to primary medical and behavioral health services, as well as dental services for a population of students, faculty, and staff at IU South Bend as well as underserved and disadvantaged populations in the local community. The IUSB/HL HWC will also provide an expanded resource for clinical education opportunities for students in medicine, nursing, dentistry, dental hygiene, radiography, and clinical laboratory sciences.</p> <p>Mission statement: The Indiana University South Bend/HealthLinc Health and Wellness Center engages citizens to build healthy communities in north central Indiana by providing respectful, high quality, integrative primary healthcare, and holistic health and wellness services to the community. The Health and Wellness Center aims to: 1) Promote healthy lifestyles for the community and IUSB; 2) Provide cost effective convenient healthcare services to the students, faculty, and staff of IUSB, and persons living in the community, regardless of their ability to pay; 3) Provide respectful healthcare services that are sensitive to the community's diversity; 4) Foster diversity in knowledge and experience among IUSB and the community; 5) Provide support to health science students, faculty and staff in the areas of teaching, learning, and research.</p> <p>The expansion of the IUSB/HL HWC on the campus will provide a greater resource that would lead to improved health care education and training for a growing regional health work force, as well as improved health and dental care for citizens in the communities served by well-educated and clinically trained physicians, nurses, dentists, dental hygienists radiography and clinical lab technicians. Ultimately, this project helps the region to develop its leading growth industry,</p>
	<b>Project Location</b>
	<p>Primary health: 1960 Northside Boulevard (Riverside Hall), South Bend IN 46615</p> <p>Oral health: 1002 South Esther Street (Roger S. Pecina Dental Education Clinic), South Bend, IN 46615</p>
	<b>Project Category</b>
	Education and incumbent workforce
	<b>Industry Alignment</b>
	Healthcare and Education
Project Ownership, Partners & Experience (Project Type & Readiness)	<b>Project Partners</b>
	<p>Valparaiso, IN on this project. The partners will be joint operators of the expanded Health and Wellness Clinic. Dwyer College was the recent recipient of \$6.85 million in private philanthropy to strengthen and grow its programs, including a challenge gift of \$1 million for the renovation and expansion of the Health and Wellness Center. HealthLinc and IU South Bend recently received a federal grant of \$1 million for the operation of the expanded Health and Wellness Clinic, which will be located in Riverside Hall on the IU South Bend campus.</p> <p>HealthLinc is the preferred healthcare home for those seeking accessible services in northern Indiana. It is known for its compassion and quality of care. HealthLinc is a trusted and integral partner, providing leadership for improving the</p>
	<b>Project Experience</b>
	<p>HealthLinc Community Health Centers are currently located in Valparaiso, Michigan City, Knox, Mishawaka, and East Chicago Indiana.</p> <p>The Vera Z. Dwyer College of Health Sciences has long collaborated with the regional health care industry in providing clinical training opportunities for students. IU South Bend has also partnered with the private sector to build and renovate educational facilities, notably its newly-renovated Roger S. Pecina Dental Education Clinic, which currently serves over 2,500 patients in dental hygiene each year.</p>
Project Timeline	<b>Project Start Date</b>
	6/15/2015
	<b>Project End Date</b>
	10/31/2016
Project Timeline	<b>Start within 12 months?</b>
	Yes
Project Timeline	<b>Project Timeline</b>
	<p>Planning and Design: 6/15/15-11/30/15</p> <p>Approval Process: 12/1/15-1/31/16</p> <p>Bidding and Awarding: 2/1/16-3/15/16</p> <p>Construction on Riverside Hall: 4/1/16-10/31/16</p> <p>Furniture, Fixtures, Equipment Set Up: 11/1/16-11/15/16</p> <p>Soft Opening: 1/16/16-12/15/16</p> <p>Grand Opening: 1/1/17</p>



Project Budget & Funding	Year 1 capital expenditures (\$)	\$3,758,000.00
	Year 2 capital expenditures (\$)	\$0.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$3,758,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$2,689,444.00
	Total project budget	\$6,447,444.00
	Description of Capital Expenditures	Planning and Project Management: \$109,000 Construction: \$3,125,000 (11,250 square feet at an estimated \$277.78 per square foot, based on construction at similar IU and HealthLinc facilities) Lab Equipment: \$140,000 (based on costs at similar IU and HealthLinc facilities) Security: \$40,000 Campus Physical Plant Costs: \$31,000 Contingency (10%): \$313,000 Total Build Out/Leasehold Improvements: \$3,758,000
	Description of Ongoing Expenditures	Operations: Staffing: Approximately \$2,184,385 per year for 28 employees [26 new] (including 39% benefits) Facility/Equipment Maintenance: \$81,419 per year Consumable Supplies: \$269,000 per year (10% of operating budget) Travel Expense: \$20,000 per year Lease and Utilities: \$134,640 per year (\$12/s.f.) Total: \$2,689,444
	Local public funding	\$900,000.00
	Private funding	\$2,858,000.00
	Non-profit funding	\$1,050,000.00
	Other funding	\$0.00
	RCI funding required?	Yes
	RCI funding needed	\$750,000.00
	RCI funding proportion of cap ex	20%
	Total private funds	\$3,908,000.00
	Private ratio calc	70
	Total public funds	\$1,650,000.00
	Public ratio calc	30
	Other	\$0.00
	Other ratio calc	0
	Total funding	\$5,558,000.00
	Variance between budget & funding	(\$889,444.00)
	Private/public/other funding ratio	70 / 30 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>healthcare services to the campus and local community, particularly the underserved, regardless of their ability to pay. The services to be provided include primary and preventive care services; health and wellness education; chronic disease management; prenatal care; women's health services; men's health services; wellness checks and immunizations; services to treat depression, anxiety, and many other behavioral health conditions and disorders; comprehensive dental services; and pharmacy services.</p> <p>Clinical education will also be improved for students in health sciences. Clinical education can be used to strengthen health care education and the health care industry across a region in several ways: 1) As a recruiting tool to engage secondary and post-secondary students about career opportunities in medical education through observation of cutting edge technologies currently in use; 2) Increase the completion rates of health care education programs by keeping students actively involved in learning through applied clinical practice.</p> <p>The proposed IUSB/HL HWC project will greatly expand health education programming at IU South Bend's Vera Z. Dwyer College of Health Sciences, as well as expand access to healthcare for the underserved in the local community. Additionally, the Roger S. Pecina Dental Education Clinic will expand with access to full dental services for the underserved. IU Dental School's third-year residents will have new opportunities in clinical practice and provide primary dental services at IU South Bend, which expands upon previously provided dental hygiene services alone.</p> <p>The proposed IU South Bend HealthLinc Health and Wellness Center project aligns closely with the projected rapid growth of the health care industry in the region. IU South Bend studied regional workforce and degree program needs through its new Academic Master Plan, 2014-2020. Evidence indicates a strong need for significant expansion in health science programs, particularly nursing, medical lab science, pharmaceutical science, and radiography.</p> <p>Currently, Indiana University is in the early phase of a multi-billion dollar, state-wide capital campaign, entitled "FOR ALL: The Indiana University Bicentennial Campaign," which celebrates the university's 200th anniversary in 2020. One of the major campaign themes of this campaign is "Creating a Healthier State, Nation, and World." IU South Bend recognizes the importance of</p>
	<b>Anticipated return on investment (%)</b>	21
	<b>Description of anticipated return on investment</b>	Based on the state's investment of \$750,000 to construct the facility, it is estimated that annual state payroll tax on the direct jobs at the IUSB/HL HWC would yield about \$53,431 per year. Additionally, estimated state taxes on staff and student/staff expenditures (\$1,500,000/year) would yield \$108,000 per year, bringing the total state income to \$158,431 or 21% of the state grant. Given this formula, the state's investment would be repaid in approximately 5 years.
	<b>Annual sales or other non-tax revenue generated (\$)</b>	2689444
	<b>Description of annual sales or other non-tax revenue generated</b>	<p>Average annual income from federal grant: \$650,000</p> <p>Average annual income from program services: \$1,775,124</p> <p>Average annual income from IUSB base budget: \$264,290 [1 MD+1 student health coordinator]</p> <p>Total average annual income: \$2,689,444</p>
	<b>Jobs created (if applicable)</b>	26
	<b>Description of jobs created (if applicable)</b>	<p>3% annual increase]</p> <p>1.0 FTE Family Practice Physician/Medical Director (\$155,000)</p> <p>1.0 FTE Family Nurse Practitioner (\$93,000)</p> <p>1.5 FTE Nurse Practitioners (\$93,000/FTE)</p> <p>2.0 FTE Dentists (\$135,000/FTE)</p> <p>1 FTE Behavioral Health Consultant (contract) (\$70,000)</p> <p>0.05 FTE Psychiatrist (contract) (\$75,000)</p> <p>1 FTE Site Manager (\$65,000)</p> <p>1.0 FTE Care Team Nurse (\$63,000)</p> <p>2.0 FTE Dental Assistants (\$50,000/FTE)</p> <p>3.5 FTE Patient Service Representatives (\$24,000/FTE)</p> <p>1 FTE Medical Records (\$25,000)</p> <p>1 FTE Intake Coordinator (\$22,500)</p> <p>1 FTE Community Outreach Worker (\$26,000)</p> <p>8.0 FTE Medical Assistants (\$26,000/FTE)</p> <p>0.5 FTE Dental Hygienist (\$25,000)</p> <p>0.5 FTE Referral Coordinator (\$12,500)</p> <p>Total: \$1,381,500+benefits+3% average annual increase</p> <p>Indirect Job Growth:</p> <p>IU South Bend contributes to the development of a high-qualified workforce for the regional health care industry. According to the U.S. Bureau of Labor Statistics, occupations and industries related to health care are projected to add the most new jobs between 2012 and 2022. National health care employment is projected to increase 10.8 percent, or 15.6 million, during the decade. A recent study for IU's regional campuses conducted by Deloitte indicated projected growth of jobs in the industries served by the regional campuses. For the IU South Bend region, the largest expected demand among industry groups is in health care practitioners and technical occupations, expected to grow 17% over ten years, adding 2,421 jobs due to growth and needing 3,442 more due to replacements.</p> <p>Ultimately, the IUSB/HL HWC is needed to help educate providers and fill an estimated 5,863 health care jobs across the four-county region over the next ten years.</p> <p>Future Physicians: \$170,000 average salary + benefits for Indiana</p> <p>Future Nurse RN: \$64,000 average salary + benefits for Indiana</p> <p>Future Nurse Practitioner: \$93,000 average salary + benefits for Indiana</p> <p>Future Dentist: \$144,000 average salary + benefits for Indiana</p> <p>Future Dental Hygienist: \$65,000 average salary + benefits for Indiana</p> <p>Future Clinical Lab Technologist: \$58,000 average salary + benefits for Indiana</p>



### Project #29 - Plymouth Aquatics Center

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Angela Drury
	Project Description	Plymouth Aquatics Center is a facility providing aquatics programming for recreation, education, health, rehabilitation, and competitive sports to the Northern Indiana Region on a year round basis. In addition to 3 pools: 1. Ten lane 25 yard recreation and competition 2. Four to six lane warm water teaching, exercise, and, recreation 3. Warm water therapy pool for rehabilitation), an outpatient rehabilitation suite and community accessible exercise facility are proposed.
	Project Location	The project will be located in Plymouth, Indiana at the southeast corner of Baker and Richter Streets on an 11 acre parcel currently listed for sale. While site control remains to be completed, the property owner and realtor are in communication with the facility committee. Funding received through RCI would catalyze the project effort. A street address has not yet been assigned.
	Project Category	Quality of place
	Industry Alignment	Not Applicable
	Project Partners	1. City of Plymouth - Public Partner and proposed owner/operator of the facility 2. St. Joseph Regional Medical Center - Private Non Profit Partner and proposed operator of rehabilitative initiative 3. Plymouth Community Schools - Public Partner and utilizer of facility for competition and education 4. Plymouth Aquatics Club (PAC) - Private Non Profit Partner and utilizer of facility for competition and education. PAC is currently the primary driving force behind the project. 5. Marshall County Community Foundation (MCCF) - Private Non Profit Partner
	Project Experience	Plymouth Aquatics Club has an advisory committee consisting of business, government, and non profit leaders who have been meeting regularly for the past thirty months. A feasibility study by TSE Consulting is complete and preliminary architectural plans and budget by Schmidt Associates are complete. These documents are attached for review.

Project Timeline	Project Start Date	9/1/2015
	Project End Date	5/1/2018
	Start within 12 months?	Yes
	Project Timeline	RCI funding would catalyze the transformational nature of the project, and project timeline dates are estimated based upon raising adequate capital to begin land acquisition, architectural design, and construction on this project.

Year 1 capital expenditures (\$)	\$937,000 (Philanthropic/Private)/\$312,400 (Local)/\$312,400 (RCI)
Year 2 capital expenditures (\$)	\$5,220,000 (Philanthropic/Private)/\$1,740,000 (Local)/\$1,740,000 (RCI)
Year 3 capital expenditures (\$)	\$2,280,000 (Philanthropic/Private)/\$760,000 (Local)/\$760,000 (RCI)



### Project Budget & Funding

<b>Year 4 capital expenditures (\$)</b>	\$0.00
<b>Year 5 capital expenditures (\$)</b>	\$0.00
<b>Total Capital Expenditures</b>	\$14,062,000.00
<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$700,000.00
<b>Total project budget</b>	\$14,762,000.00
<b>Description of Capital Expenditures</b>	<p>Year 1: September 2015-August 2016 - \$1,562,000 - Capital Campaign(September 2015-August 2016),Land Purchase, Architectural Design (September-December 2015,) Project Bids (May 2016), RDC Bond Issue (June 2016)</p> <p>Year 2: September 2016-August 2017 - \$8,700,000 - Initial Construction Costs</p> <p>Year 3: September 2017-May 2018 - \$3,800,000 - Balance of Construction Costs with occupancy May 2018</p>
<b>Description of Ongoing Expenditures</b>	Operational expenditures for utilities, pool maintenance/chemicals/water, staffing, program administration, and administrative/maintenance staff for the facility are estimated based upon the feasibility study completed by TSE.
<b>Local public funding</b>	\$2,812,400 - City of Plymouth, Redevelopment Commission, Plymouth Community School Corporation, Surrounding Community Schools
<b>Private funding</b>	\$8,000,000 Philanthropic Individual/Corporation
<b>Non-profit funding</b>	\$437,200 MCCF, St. Joseph Regional Medical Center, PAC, Local Community College
<b>Other funding</b>	\$0.00
<b>RCI funding required?</b>	Yes
<b>RCI funding needed</b>	\$2,812,400.00
<b>RCI funding proportion of cap ex</b>	20%
<b>Total private funds</b>	\$8,437,200.00
<b>Private ratio calc</b>	60
<b>Total public funds</b>	\$5,624,800.00
<b>Public ratio calc</b>	40
<b>Other</b>	\$0.00
<b>Other ratio calc</b>	0
<b>Total funding</b>	\$14,062,000.00
<b>Variance between budget &amp; funding</b>	(\$700,000.00)
<b>Private/public/other funding ratio</b>	60 / 40 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>This project addresses recreation, safety/education, health/wellness, and competitive aquatics program within a single facility within our regional area. These are features desirable to business and families when choosing communities they would like to locate in. Drowning is the leading cause of accidental death in children under age 5 and 2nd leading cause of accidental death in children ages 5-14. Rates of drowning in children ages 1-4 can be reduced by 88% if children participate in swimming lessons. The proposed facility will address a deficit of affordable Learn to Swim opportunities on a year round basis within the greater North Central Indiana Region. Only two of the Marshall County School Systems have a pool of any kind. This facility will provide the ability to host events (Sectionals, NLCs, and Age Group Invitational/Championships) would bring visitors to the region, and provide economic benefit in the form of hotel, dining, and shopping revenues. Additionally this facility could be home to St. Joseph Regional Medical Center Outpatient Rehabilitation which would provide aquatics rehab services with a focus on transition to utilization of a community exercise facility to expand health and wellness initiatives within the Michiana area.</p> <p>Teaching people to swim will have a positive fiscal impact because it is more cost-effective to teach people to swim than to provide life support or services to a near-drowning or drowned person. USA Swimming estimates that the minimum cost of drowning is \$35,000 per person. Typical medical costs for a near-drowning victim can range from \$75,000 for emergency treatment to \$180,000/year for long-term care. Treatment for brain damage from a near-drowning can be more than \$4.5 million.</p>
	<b>Anticipated return on investment (%)</b>	Placement of a value on human life is impossible, and the anticipated return on investment should be viewed as priceless.
	<b>Description of anticipated return on investment</b>	<p>This is a quality of life project which will be difficult to measure. However, evidence of impact will be noted in water education/safety, utilization for health/recreation, and visitors to our community.</p> <p>The return on investment is measured through the increase in youth learning water safety/swimming skills and corresponding decrease in water related accidents and deaths.</p>
	<b>Annual sales or other non-tax revenue generated (\$)</b>	650000
	<b>Description of annual sales or other non-tax revenue generated</b>	Revenues generation in the form of learn to swim/aquatic programming, recreational swim, aquatic/rehabilitation therapy, specialized aquatic programming (scuba, kayaking), competitive swim team usage, third party special event rentals, community programs, vending, and specialized aquatic education/training (lifeguard/dive team.) All revenues will be public income.
	<b>Jobs created (if applicable)</b>	18
	<b>Description of jobs created (if applicable)</b>	Jobs consisting of director, program director, business office, therapist, lifeguards, and maintenance will be needed.



## Project #30 - Plymouth Tennis Court &amp; Park Pavilion

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Mike Hite, Plymouth Parks Sup't and Sarah G. Smith
	Project Description	Plymouth Youth Tennis and Pickle Ball Courts & Park Pavilion Expansion & Restoration: The State's involvement would greatly enhance an existing effort to: * New 4 36' courts for new youth (USTA 10&Under) league, new Senior Pickle Ball League, and regional competitions * Enhance and expand adjacent Park Pavilion for purposes of regional tournament management, city lesson & league operations, and general community enjoyment of all generations.
	Project Location	Address: Centennial Park (east end of park at southeast corner of Becknell and Randolph Streets) - park entrance 1660 N Michigan Street City: Plymouth County: Marshall
	Project Category	Quality of place
	Industry Alignment	0
	Project Partners	*Plymouth Community School Corporation - long time renter of the park facilities *Plymouth Tennis Club & Tennis Facility Improvement Committee - local 501c which manages the lessons, tournaments, and leagues through agreement with the city & park.
	Project Experience	Proven Success: The City of Plymouth & Park Department, the Plymouth Community School Corporation (PCSC), and the Plymouth Tennis Club have worked in cooperation since the early 1970's in a successful model that leverages two tax bases behind one shared facility - where in many communities similar entities struggle to maintain two separate facilities. PCSC and the City have a service agreement allowing PCSC use of the park courts for school competitions and PE classes in exchange for an annual service fee which contributes to the facility maintenance. The City manages the maintenance efforts. The Plymouth Tennis Club manages the lesson and league operations, including enrollment, staffing, and payroll, and contributes profits to facility supplies and maintenance.  The City is the primary public provider in the \$83,000 of public funds committed to the project. Plymouth Tennis Club has given \$75,000 to date.
e	Project Start Date	10/1/2014
	Project End Date	6/1/2016
	Start within 12 months?	Yes



Project Timeline	<b>Project Timeline</b>	January 2012-October 2014: Pre-Project work: needs study, site selection exploration, stakeholder development, donor development and fundraising October 2014 - January 2015: Site surveying and soil studies February - May 2015: Site Feasibility Study May 2015: Site Decision June 2015: Design Decision July - August: Bid Process September 2015: Groundbreaking May 2016: Project complete

Project Budget & Funding	<b>Year 1 capital expenditures (\$)</b>	\$416,000.00
	<b>Year 2 capital expenditures (\$)</b>	\$0.00
	<b>Year 3 capital expenditures (\$)</b>	\$0.00
	<b>Year 4 capital expenditures (\$)</b>	\$0.00
	<b>Year 5 capital expenditures (\$)</b>	\$0.00
	<b>Total Capital Expenditures</b>	\$416,000.00
	<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$2,500.00
	<b>Total project budget</b>	\$418,500.00
	<b>Description of Capital Expenditures</b>	Total: \$416,000 \$146,000 for new construction of 4 - 36' lighted courts for age 10-and-under tennis league play and instruction as well as for Pickleball play for all ages, especially seniors. \$270,000 estimated for expansion and improvements to adjacent pavilion and complex.
	<b>Description of Ongoing Expenditures</b>	Amount above stated averaged annually: Courts require \$700 annual maintenance for crack sealing with a \$5,000 expense every 8 years for resurfacing. Pavilion will need \$2000 annual maintenance as pertains to restrooms, roofing. Facility daily maintenance assumed to maintain same level as currently, i.e. no additional headcount.
	<b>Local public funding</b>	\$83,000.00
	<b>Private funding</b>	\$125,000.00
	<b>Non-profit funding</b>	\$100,000.00
	<b>Other funding</b>	\$25,000.00
	<b>RCI funding required?</b>	Yes
	<b>RCI funding needed</b>	\$83,000.00
	<b>RCI funding proportion of cap ex</b>	20%
	<b>Total private funds</b>	\$225,000.00
	<b>Private ratio calc</b>	54
	<b>Total public funds</b>	\$166,000.00
	<b>Public ratio calc</b>	40
	<b>Other</b>	\$25,000.00
	<b>Other ratio calc</b>	6
	<b>Total funding</b>	\$416,000.00



<b>Variance between budget &amp; funding</b>	(\$2,500.00)
<b>Private/public/other funding ratio</b>	54 / 40 / 6

Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>This project will help transform the identity of the Plymouth community as it will serve as a welcoming venue to athletes and families. With the State's participation, the impact of this existing effort will be greatly enhanced. Plymouth would like to return as a destination for regional youth tennis competition, pickle ball events and the many young families and seniors who travel to compete in such events. Plymouth has a history and reputation dating back to the late 1970's of a strong, successful tennis presence - in a community where no indoor courts exist. All through the success of a strong parks program in tennis, the city once hosted qualifying tournaments for the USTA Western Open. Now many of those tennis players have either children entering the sport or have scaled back their court coverage to the more manageable game of Pickle Ball.</p> <p>Additionally, the project includes improvements to the adjacent shelter and pavilion. The pavilion hosts park activities, private receptions, reunions, and park programming. The improvements to the kitchen and restroom facilities will enhance the use of the adjoining acres of open lawn in beautiful Centennial Park. The community does not have many significant private venues of this nature and size.</p> <p>Project is part of City of Plymouth Park Department 5 Year Plan.</p>
	<b>Anticipated return on investment (%)</b>	0
	<b>Description of anticipated return on investment</b>	<p>As raw ROI, the requested state investment of \$83,000 alone will exceed the anticipated revenue benefits of \$27,000 in 11 years, assuming 6% at net present value. Without the State's funds, improvements will be scaled back which will have a negative effect on the potential revenues.</p> <p>The Transformational Impact on Community as a tourney destination and on the quality of life are most significant.</p>
	<b>Annual sales or other non-tax revenue generated (\$)</b>	27000
	<b>Description of annual sales or other non-tax revenue generated</b>	<p>Regional Tournament Revenue per event x 2 per year - \$3000</p> <p>Retail Revenue (food, gas, sporting goods) per event x 2 per year - \$10,000</p> <p>Retail Revenue per 20 School tennis events per year - \$14,000</p>
	<b>Jobs created (if applicable)</b>	0
	<b>Description of jobs created (if applicable)</b>	New regional events will be run by Plymouth Tennis Club, a volunteer not-for-profit organization.



## Project #32 - Riverwalk Mapleheart Trail Connection

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	<b>Project Contact</b>	Kyle Hannon
	<b>Project Description</b>	Riverwalk Mapleheart Connection  Connect the RiverWalk to the Mapleheart Trail, connecting two communities with a multi-use trail.  The RiverWalk connects to Elkhart's bicycle Routes. The Mapleheart connects to Goshen's trail system, including the Pumpkinvine, which connects to Middlebury and Shipshewana.
	<b>Project Location</b>	Near Downtown Elkhart, Elkhart County, Indiana  The RiverWalk ends near the intersection of Prairie St. and Waterfall Drive. The Mapleheart Trail begins at the intersection of Indiana Ave. and Sterling Ave.
	<b>Project Category</b>	Quality of place
	<b>Industry Alignment</b>	Tourism/recreation
	<b>Project Partners</b>	City of Elkhart Elkhart County City of Goshen Beacon Health System IU Health - Goshen Greater Elkhart Chamber of Commerce Elkhart County Community Foundation
	<b>Project Experience</b>	Elkhart County parks developed the MapleHeart Trail, which would connect to this project. They developed a multi-use path along CR 10 in Elkhart County, with plans to expand. Elkhart City has developed several bicycle lanes through the city and is in the process of planning other multi-use paths.

Project Timeline	<b>Project Start Date</b>	6/30/2015
	<b>Project End Date</b>	12/31/2016
	<b>Start within 12 months?</b>	Yes
	<b>Project Timeline</b>	June 30 - July 31: Finalize route. City owns both ends and some parts in between. Determine which route will serve goals of project. Aug 1 - Oct 31: Design work. March 1, 2016: Begin construction. December 1, 2016: Complete construction.

	<b>Year 1 capital expenditures (\$)</b>	\$300,000.00
	<b>Year 2 capital expenditures (\$)</b>	\$600,000.00
	<b>Year 3 capital expenditures (\$)</b>	\$0.00
	<b>Year 4 capital expenditures (\$)</b>	\$0.00



Project Budget & Funding	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$900,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$0.00
	Total project budget	\$900,000.00
	Description of Capital Expenditures	Design work and acquisition for first 6 months. Construction for next 12 months.
	Description of Ongoing Expenditures	Ongoing maintenance will be handled by City of Elkhart and Elkhart County parks departments and roads crews. No additional cost anticipated.
	Local public funding	\$180,000.00
	Private funding	\$290,000.00
	Non-profit funding	\$250,000.00
	Other funding	\$0.00
	RCI funding required?	Yes
	RCI funding needed	\$180,000.00
	RCI funding proportion of cap ex	20%
	Total funding	\$900,000.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	60 / 40 / 0

Project Impact	Project impact and alignment with local or regional plans	<p>Connect 4 communities - Though the proposed project is less than a mile in length, it connects the multi-use trail system of Elkhart (pop. 51,000), Goshen (32,000), Middlebury (3,500), and Shipshewana (700). It will serve the overall population of Elkhart County (200,000).</p> <p>Once this connection is made, the cities of Elkhart, Mishawaka and South Bend will begin looking at ways to connect our communities. This will lead to one of the largest multi-use paths in the State of Indiana.</p> <p>Plans: City Comprehensive Plan MACOG Regional Bicycle and Pedestrian Facilities Map - Identifies the area currently as an "unsigned route" which is used to connect systems. It is identified as a needed improvement to improve regional connectivity between Elkhart and Goshen. Pedal Panel Report - This project was the first recommendation of the Pedal Panel, a blue-ribbon bicycle commission created by Mayor Dick Moore in 2010 and completed in 2011.</p>
	Anticipated return on investment (%)	24
	Description of anticipated return on investment	<p>According to an economic study in the Indy Greenways Master Plan. <a href="https://indygreenwaysmasterplan.files.wordpress.com/2014/03/indy-greenways-ch-5_economic-impact.pdf">https://indygreenwaysmasterplan.files.wordpress.com/2014/03/indy-greenways-ch-5_economic-impact.pdf</a>, property values along the Monon Trail increased 11.4%. If we conservatively say property levels within 10 miles of this project will increase 2.5% x the average home price of \$103,475 = \$2587. If only 1/4 of the 1,732 homes sold in a year (433) see that increase, it equals \$1,120,171</p>



<b>Annual sales or other non-tax revenue generated (\$)</b>	20000
<b>Description of annual sales or other non-tax revenue generated</b>	<p>According to the same study, the low end of economic activity generated along a trail is \$2 per person. The Monon Trail has 20,000 users per mile. If we count only half of that usage with the low end of economic activity per person, it equals \$20,000. Once the last mile is completed the trail length is longer than the Monon and the economic activity could be much higher.</p> <p>We used the very conservative estimate of per-person expenditures, based on soft sales including food and drinks.</p> <p>Along the trail there are opportunities for shopping and dining that cost far more than \$2 per person.</p>
<b>Jobs created (if applicable)</b>	9
<b>Description of jobs created (if applicable)</b>	<p>Using formula from same study, an estimated 9 people will be needed to complete this section. Total cost \$900,000 x 40% cost of labor = \$360,000/ave construction wage in Elkhart/Goshen MSA of \$42,440 = 8.5 people.</p> <p>Local municipal workers will then be in charge of maintenance. No additional workers are anticipated for maintenance.</p>



## Project #34 - Marshall County Trail System

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Ralph Booker, Plan Director, Marshall County Plan Commission
	Project Description	Develop Marshall County Trail System Link communities: - Lake Max Bike Trail - Culver/Plymouth - Extension to Ancilla - Connection to Nickle Plate Trail (Rochester to Kokomo)
	Project Location	Marshall County - Culver, Plymouth, Ancilla College
	Project Category	Quality of place
	Industry Alignment	0
	Project Partners	-Marshall County communities -IN DNR, Parks and Recreation -Marshall County govt -Marshall County Visitors and Convention Bureau -Culver Academies -Form a "Friends of..." 501c3? -Chamber of Commerce: Bremen, Culver, Plymouth -Possible private investors (?) -MCCF
	Project Experience	Plymouth has implemented a Phase 1 and 2 of trail for the Advanced Greenway Trail project
Project Timeline	Project Start Date	6/1/2016
	Project End Date	5/31/2017
	Start within 12 months?	Yes
	Project Timeline	Complete Greenway trail from Jefferson Street to Riverpark on Garro Street. The next phase will take Greenways Trail from Riverpark to Southgate. This will include a bridge over the Yellow River.
	Year 1 capital expenditures (\$)	\$1,445,000.00
	Year 2 capital expenditures (\$)	\$1,445,000.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$2,890,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$0.00



Project Budget & Funding	Total project budget	\$2,890,000.00
	Description of Capital Expenditures	Maintaining the bridge and payment.
	Description of Ongoing Expenditures	Ongoing expenditures will be incorporated into the Plymouth Parks Department budgets.
	Local public funding	\$800,000.00
	Private funding	\$0.00
	Non-profit funding	\$1,290,000.00
	Other funding	\$0.00
	RCI funding required?	Yes
	RCI funding needed	\$800,000.00
	RCI funding proportion of cap ex	28%
	Total private funds	\$1,290,000.00
	Private ratio calc	45
	Total public funds	\$1,600,000.00
	Public ratio calc	55
	Other	\$0.00
	Other ratio calc	0
	Total funding	\$2,890,000.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	45 / 55 / 0

Project Impact	Project impact and alignment with local or regional plans	<p>Culver: included in comprehensive plan, applied for a federal grant for trails; Culver Academies part of plan in cooperation w/County; application withdrawn (2005) pending establishment of suitable route around south end of lake. Remains goal of Culver comp plan; could start w/north end of lake.</p> <p>Plymouth has already implemented Phase 1 of its Advanced Greenway Trail and has funded Phase 2, which will be constructed in 2017. Phase 3 is planned to take the trail from Riverpark Square to Southgate Park.</p>
	Anticipated return on investment (%)	0
	Description of anticipated return on investment	Will increase the quality of life in Plymouth to help attract employees.
	Annual sales or other non-tax revenue generated (\$)	7500
	Description of annual sales or other non-tax revenue generated	Sales at entities that support and/or benefit from trail recreation
	Jobs created (if applicable)	1
	Description of jobs created (if applicable)	Employee at entity that supports trail recreation



## Project #35 - South Shore Rail

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Michael Noland, General Manager, Northern Indiana Commuter Transportation District
	Project Description	South Shore Infrastructure Renewal & Recapitalization Project. This series of infrastructure projects are precursors to making other infrastructure improvements and service enhancements to improve South Bend's connectivity to Chicago. This project includes the final phase of a multi-year investment to upgrade the last 21 miles of our aging overhead power distribution system, upgrade 8.3 track miles of rail from 100# to 115# rail and extend Birchim Siding with hi-speed turnouts located in eastern LaPorte County by 4,500'. The overhead wire design and hardware dates back to the 1920s and wire failures are the single leading cause of lengthy train delays. The remote location of our railroad between South Bend and Michigan City represents a significant safety concern where passengers could be stranded in either bitterly cold or extreme heat or other extreme weather conditions. The existing rail was manufactured in the early 1900s and is subject to a higher rate of failure due to wear, fatigue, and internal flaws. Furthermore, 100# rail and track components are no longer manufactured. Extending Birchim Siding will give us the ability to increase South Bend service by providing a longer siding for east and westbound trains to pass at faster speeds. Also includes \$1M to conduct the engineering study in preparation for phase two of the project (South Bend Track Realignment)
	Project Location	The project is located between South Bend (St. Joseph Co) and Michigan City (LaPorte Co) covering a distance of 28 miles.
	Project Category	Infrastructure
	Industry Alignment	The South Shore is the only regional commuter rail passenger service in Indiana linking South Bend and communities in Northwestern Indiana with Chicago. We support all regional industries with accessible connections to the South Bend Airport and Chicago.
	Project Partners	Previous investments have been supported with federal and state grants. We're anticipating that the US Department of Transportation will once again provide ongoing capital support for this project. Our contractors have included Meade Electric, Aldridge, and Goyal Industries (major hardware supplier). For the track work we have used Railworks.
Project Timeline	Project Experience	As mentioned in the project description, we have designed, engineered and installed 65.4 track miles of new overhead wire since 2006. Previous to the wire project we installed a new centralized traffic control system, bi-directional signaling, and fiber optic communication network to support the wire upgrade effort. This final 21 miles of overhead wire would complete the entire railroad. Last year we also replaced 5 track miles of 100# rail using contractor and NICTD forces. We also replaced five turnouts in preparation for 115# rail.
	Project Start Date	4/1/2016
	Project End Date	6/30/2017
	Start within 12 months?	Yes
	Project Timeline	April thru November 2016 – Overhead wire- undertake advance work on superstructure including installation of poles, balance weight foundations, feeder arms, 2300 arms and insulators. Rail & Birchim Siding – order welded rail and distribute along right-of-way, order high speed turnouts, build embankment and sub-grade for Birchim Siding extension. April thru June 2017 – Overhead wire - hire a contractor to supplement our forces to install new system including cantilever arms, wire, and hangers and demolish old wire. Rail & Birchim Siding – install high speed turnouts at both ends of Birchim Siding, install welded 115# rail in Birchim Siding and build 4,500' of track to extend Birchim Siding. Engineering study for South Bend realignment project
	Year 1 capital expenditures (\$)	\$19,600,000.00
	Year 2 capital expenditures (\$)	\$12,125,000.00



### Project Budget & Funding

<b>Year 3 capital expenditures (\$)</b>	\$0.00
<b>Year 4 capital expenditures (\$)</b>	\$0.00
<b>Year 5 capital expenditures (\$)</b>	\$0.00
<b>Total Capital Expenditures</b>	\$31,725,000.00
<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$942,000.00
<b>Total project budget</b>	\$32,667,000.00
<b>Description of Capital Expenditures</b>	<p>Year 1: \$19,600,000 Overhead wire: 13,940,000 Rail: 2,850,000 Study: 1,000,000 Birchm extension: 1,810,000</p> <p>Year 2: \$12,125,000 Overhead wire: 6,560,000 Rail: 2,850,000 Birchm extension: 2,715,000</p> <p>Funding Share: Federal DOT: 19,035,000 (60%) State Public (Regional Cities): 4,758,750 (15%) Local Public (NICTD): 4,608,750 (14.53%) Local Public (TIGER Federal applied to local public to match state public): \$150,000 Local Private: 0% (offset by separate projects that are fully privately funded)</p>
<b>Description of Ongoing Expenditures</b>	Ongoing track and overhead wire maintenance cost will continue to be funded by NICTD through its existing revenue sources.
<b>Local public funding</b>	\$4,758,750.00
<b>Private funding</b>	\$0.00
<b>Non-profit funding</b>	\$0.00
<b>Other funding</b>	\$21,507,500.00
<b>RCI funding required?</b>	Yes
<b>RCI funding needed</b>	\$5,458,750.00
<b>RCI funding proportion of cap ex</b>	17%
<b>Total private funds</b>	\$0.00
<b>Private ratio calc</b>	0
<b>Total public funds</b>	\$10,217,500.00
<b>Public ratio calc</b>	32
<b>Other</b>	\$21,507,500.00
<b>Other ratio calc</b>	68
<b>Total funding</b>	\$31,725,000.00
<b>Variance between budget &amp; funding</b>	(\$942,000.00)
<b>Private/public/other funding ratio</b>	0 private/30 public/70 federal (doesn't count as public for ROI)



Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>The NICTD Board adopted a strategic business plan in 2014 identifying a series of infrastructure investments that will significantly reduce travel time to Chicago. The goal is 90 minutes from South Bend to Chicago, 60 minutes from Michigan City, low-50s from Chesterton, mid 40's from Gary, and low-30s from East Chicago. It's vital that we enhance connectivity to the nation's 3rd largest economy where jobs on average pay 40% more than similar jobs in northern Indiana. This plan will establish northern Indiana as the newest suburb of Chicago and provide the foundation for competing with Chicago's north and west suburbs.</p> <p>The project is listed in Northwest Indiana Regional Plan Commission's 2040 Comprehensive Regional Plan and 2014-2017 Transportation Improvement Program and the Michiana Area Council of Governments 2014-2018 Transportation Improvement Program and the FY 2014-2017 Indiana State Transportation Improvement Program.</p>
	<b>Anticipated return on investment (%)</b>	315
	<b>Description of anticipated return on investment</b>	<p>The improvements identified in our application are essential to the continuance of South Shore rail service from South Bend to Michigan City, and without them NICTD would – at an indeterminable, but not far off, time - be forced to terminate service to South Bend. The result would be a line that ends in Michigan City.</p> <p>According to an independently contracted Regional Benefits Analysis conducted by Policy Analytics, LLC [an Indianapolis firm] completed in 2014, the current South Shore service generates \$427M in personal income to the region (2012 dollars). These economic benefits extend throughout the Northwest and North Central Indiana region. South Bend accounts for 3.4% of South Shore's total weekday ridership and by implication therefore approximately 3.4% of those benefits, or \$14.5M annually should be apportioned to the greater South Bend/Mishawaka economy. Therefore, the \$4.6M regional cities investment would yield a 2015 Return on Investment of 3:1.</p>
	<b>Annual sales or other non-tax revenue generated (\$)</b>	2500000
	<b>Description of annual sales or other non-tax revenue generated</b>	Ridership models predict that with this investment and others to follow, South Bend ridership could nearly double from 260,560 annual passengers to over 438,000 passengers by 2033. With an average fare of \$10 we could experience a revenue increase of \$1,774,400 (both directions).
	<b>Jobs created (if applicable)</b>	0
	<b>Description of jobs created (if applicable)</b>	By improving connectivity to Chicago we believe more northern Indiana residents will seek employment in Chicago. On average a Chicago jobs earns 40% more than similar jobs in northern Indiana. These wages are returned to Indiana and reinvested in the community to purchase homes, goods and services. Furthermore, a faster, more reliable commuter rail connection opens northern Indiana to new investment by new knowledge based industries where talent is attracted to low property taxes, superior housing, good schools and other quality of place attributes.



## Project #36 - Marshall County Infrastructure Development

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	<b>Project Contact</b>	Jerry Chavez, Executive Director of the Marshall County EDC
	<b>Project Description</b>	Marshall County Infrastructure Development - Project includes water and sanitary sewer trunk line, electric distribution system improvements, and roadway construction specifically for industrial development and attraction. The project will prepare several greenfield sites for new development due to increased utility capacities and access resulting in an increase in the number of businesses that will expand to Marshall County. Infrastructure improvements are proposed for five (5) jurisdictions as identified below.
	<b>Project Location</b>	The type of infrastructure development in each of the following jurisdictions includes: 1.) Town of Argos - Water, Sanitary Sewer, Road & Rail. 2.) Town of Bremen - Water, Sanitary Sewer & Electric. 3.) Town of Bourbon - Water & Sanitary Sewer. 4.) Town of Culver - Water, Sanitary Sewer & Road. 5.) City of Plymouth - Water, Sanitary Sewer, Road & Rail.
	<b>Project Category</b>	Infrastructure
	<b>Industry Alignment</b>	Advanced manufacturing
	<b>Project Partners</b>	Town of Argos Town of Bremen Town of Bourbon Town of Culver City of Plymouth Marshall County EDC
	<b>Project Experience</b>	The City of Plymouth and Town of Bremen have experience in the development of industrial parks in their respective communities. Additionally, the Town of Argos and the Town of Bourbon are beginning to plan for future industrial park development as committees have been formed to discuss the process. The MCEDC Executive Director has prior experience in developing five (5) separate industrial parks, one of which received national recognition by the International Economic Development Council.
Project Timeline	<b>Project Start Date</b>	1/1/2016
	<b>Project End Date</b>	12/31/2017
	<b>Start within 12 months?</b>	Yes
	<b>Project Timeline</b>	Project process has started in the Towns of Argos, Bremen, Bourbon, and Culver, and the City of Plymouth. The project schedule includes the following: 1.) Master plan development for industrial parks in the Town of Argos & City of Plymouth. 2.) Committees in the Towns of Bourbon & Bremen have been organized.
	<b>Year 1 capital expenditures (\$)</b>	\$2,500,000.00
	<b>Year 2 capital expenditures (\$)</b>	\$11,600,000.00



### Project Budget & Funding

<b>Year 3 capital expenditures (\$)</b>	\$0.00
<b>Year 4 capital expenditures (\$)</b>	\$0.00
<b>Year 5 capital expenditures (\$)</b>	\$0.00
<b>Total Capital Expenditures</b>	\$14,100,000.00
<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$0.00
<b>Total project budget</b>	\$14,100,000.00
<b>Description of Capital Expenditures</b>	Year 1: Argos= \$1.5 MM & Plymouth= \$1 MM Year 2: Bremen= \$4 MM, Bourbon= \$1.35 MM, Culver= \$2 MM, Plymouth= \$1.75 MM, Argos= \$1.50 MM, La Paz= 1.0 M Capital expenditures include engineering and construction costs related to water, sanitary sewer, electric, roadway, and rail spur improvements.
<b>Description of Ongoing Expenditures</b>	Total = 0. Description: N/A
<b>Local public funding</b>	\$2,820,000.00
<b>Private funding</b>	\$6,460,000.00
<b>Non-profit funding</b>	\$1,000,000.00
<b>Other funding</b>	\$1,000,000.00
<b>RCI funding required?</b>	Yes
<b>RCI funding needed</b>	\$2,820,000.00
<b>RCI funding proportion of cap ex</b>	20%
<b>Total private funds</b>	\$7,460,000.00
<b>Private ratio calc</b>	53
<b>Total public funds</b>	\$5,640,000.00
<b>Public ratio calc</b>	40
<b>Other</b>	\$1,000,000.00
<b>Other ratio calc</b>	7
<b>Total funding</b>	\$14,100,000.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	53 / 40 / 7



Project Impact	<b>Project impact and alignment with local or regional plans</b>	Increased infrastructure capacities and access to greenfields will improve the regional economy as more businesses will expand into Marshall County due to being prepared with the necessary infrastructure foundation. The City of Plymouth and Town of Argos each have a site that has been certified as "shovel ready" by IEDC/OCRA, and additional infrastructure is the next step in developing these and creating other shovel ready sites. Infrastructure development is a goal and strategy included within each of the municipality's comprehensive plans, and capital improvement plans. Plymouth, Bremen, and Culver have all recently updated their comprehensives, which have identified infrastructure development as a key to future growth and development. Bourbon is currently in the process of updating their comprehensive plan.
	<b>Anticipated return on investment (%)</b>	0
	<b>Description of anticipated return on investment</b>	\$120 - 240 MM. This project is expected to assist in the attraction of 12 mid-size businesses with each averaging \$10-20 MM in capital investment and land development. Capital investment on equipment, anticipated personal and real property revenue, and economic impact of expected jobs created (wages, income taxes, multiplier effects, etc.) realized through development of greenfield sites
	<b>Annual sales or other non-tax revenue generated (\$)</b>	0
	<b>Description of annual sales or other non-tax revenue generated</b>	TBD - Dependent upon the types of industries that are attracted to the sites.
	<b>Jobs created (if applicable)</b>	0
	<b>Description of jobs created (if applicable)</b>	400-800 jobs. With the expected attraction of 12 mid-sized businesses, we anticipate future job growth to be between 33-66 employees per business. Various positions in advanced manufacturing including production and maintenance, technical/engineering, and administrative support (clerical, accounting, human resources, etc.)



## Project #40 - Marshall Co Manufacturing Shell Buildings

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Jerry Chavez, Executive Director of the Marshall County EDC
	Project Description	Marshall County Manufacturing Shell Buildings - To be developed for attracting new business and industry, and fill the void in the market place for "move in" ready buildings. Such buildings will adequately meet the needs of business and industry, and allow Marshall County to respond to more leads and be more competitive in attraction projects. The project includes the construction of 4 shell buildings. (See locations below.
	Project Location	One shell building will be constructed in each of the following jurisdictions: 1.) Town of Argos - 100,000 sq. ft. building, 2.) Town of Bourbon - 45,000 sq. ft. building, 3.) Town of Bremen - 45,000 sq. ft. building, and 4.) City of Plymouth - 45,000 sq. ft. building.
	Project Category	Industry-specific development, including any targeted sectors
	Industry Alignment	Advanced manufacturing
	Project Partners	Plymouth Industrial Development Corporation (PIDCO) - A private development corporation. City of Plymouth & Plymouth Redevelopment Commission Town of Bourbon & Bourbon Redevelopment Commission Town of Bremen & Bremen Redevelopment Commission Town of Argos & Argos Redevelopment Commission Marshall County Economic Development Corporation (MCEDC) Michiana Partnership Inc. - A regional economic development and marketing agencies for north central Indiana. Private sector building contractor
	Project Experience	MCEDC and the City of Plymouth completed the construction of a 45,000 sq. ft. shell building in 2014. MCEDC is actively marketing the facility to potential tenants, and expect occupation within the near term.
Project Timeline	Project Start Date	1/1/2016
	Project End Date	12/31/2017
	Start within 12 months?	Yes
	Project Timeline	Project process has started for the Town of Argos building. The project schedule includes the following: 1.) Finalize financing. 2.) Analyze market for North Central Indiana utilizing IEDC database. 3.) Determine building specifications. 4.) Finalize structure of public/private partnership between MCEDC, Towns, Redevelopment Commissions, and a Private Developer. 5.) Develop construction plans. 6.) Construct buildings. 7.) Market buildings to new business.
	Year 1 capital expenditures (\$)	\$5,000,000.00
	Year 2 capital expenditures (\$)	\$7,500,000.00



## Project Budget &amp; Funding

<b>Year 3 capital expenditures (\$)</b>	\$0.00
<b>Year 4 capital expenditures (\$)</b>	\$0.00
<b>Year 5 capital expenditures (\$)</b>	\$0.00
<b>Total Capital Expenditures</b>	\$12,500,000.00
<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$1,250,000.00
<b>Total project budget</b>	\$13,750,000.00
<b>Description of Capital Expenditures</b>	Construction costs. Year 1 = Argos building= \$5.0 MM, includes construction of one (1) 100,000 sq. ft. building Years 2 = Bourbon, Bremen & Plymouth buildings= \$7.5 MM, includes construction of three (3) 45,000 sq. ft. buildings, one (1) in each community Public funds invested (see below) provides equity
<b>Description of Ongoing Expenditures</b>	Interest payments on buildings to be paid through the respective Redevelopment Commissions= \$625 K / year, for all four (4) buildings until the buildings are sold or leased. Interest is anticipated to be \$250 K / year for the Argos building, and \$125K / year, for each of the other three (3) buildings (total = \$375K). We anticipate each building will be leased or sold within two years of construction.
<b>Local public funding</b>	\$1,250,000.00
<b>Private funding</b>	\$9,000,000.00
<b>Non-profit funding</b>	\$1,000,000.00
<b>Other funding</b>	\$0.00
<b>RCI funding required?</b>	Yes
<b>RCI funding needed</b>	\$2,500,000.00
<b>RCI funding proportion of cap ex</b>	20%
<b>Total private funds</b>	\$10,000,000.00
<b>Private ratio calc</b>	73
<b>Total public funds</b>	\$3,750,000.00
<b>Public ratio calc</b>	27
<b>Other</b>	\$0.00
<b>Other ratio calc</b>	0
<b>Total funding</b>	\$13,750,000.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	73 / 27 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	The goal of developing more shell buildings throughout the county, as the next step to build upon the success of the Commerce "shell" building in Plymouth, is included within the Marshall County Economic Development Corporation (MCEDC) strategic plan adopted in 2014. The buildings will improve the regional economy by allowing Marshall County to be better prepared to respond to time sensitive business attraction leads to draw investment from outside of Indiana.
	<b>Anticipated return on investment (%)</b>	0
	<b>Description of anticipated return on investment</b>	\$60 - 120 MM. Capital investment on equipment, anticipated personal and real property revenue, and economic impact of expected jobs created (wages, income taxes, multiplier effects, etc.)
	<b>Annual sales or other non-tax revenue generated (\$)</b>	0
	<b>Description of annual sales or other non-tax revenue generated</b>	TBD - Dependent upon the types of industries that occupy the buildings.
	<b>Jobs created (if applicable)</b>	0
	<b>Description of jobs created (if applicable)</b>	200-400 jobs. Various positions in advanced manufacturing including production and maintenance, technical/engineering, and administrative support (clerical, accounting, human resources, etc.)



## Project #41 Marshall Co Boys &amp; Girls Clubhouse

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	Billie Treber
	Project Description	Building Great Futures To address our community needs and to make the Club much more efficient, we intend to tear down the dilapidated old restaurant building. The new Clubhouse will be dedicated to innovative new programming and will be energy and resource efficient. The one floor building will provide safe, attractive, supervised and accessible spaces for youth. The Boys & Girls Club program space will be designed to provide youth in our community with age-appropriate youth development programming that is aimed at helping today's youth to develop their full potential as productive, caring and responsible citizens.
	Project Location	314 E. Jefferson Street Plymouth IN 46563
	Project Category	Quality of place
	Industry Alignment	N/A
	Project Partners	Currently in the initial stages. Construction Management & Design is a project partner enabling us to have vital design work at little to no cost.
Project Timeline	Project Experience	We have established a Blue Ribbon Committee to oversee this campaign. Rick Miller co-chair, Miller's Merry Manor; Dan Schmelter co-chair, retired Edward Jones, John Chamberlin, Edward Jones; Alan Collins, Construction Management & Design; Randy Danielson, Johnson-Danielson Funeral Home; John DeSalle, Hoosier Tire; Dave George, Oliver Ford; Art Jacobs, Gibson Insurance; Barb Miller; Gary Neidig, ITAMCO; Paul Nye; John Oliver III, Oliver Ford; Pastor Ollie Dongell, Plymouth Wesleyan Church; Sue Payne; Dr. Time Peters, SJRMC; Cindy Rash, USDA; Susan Wagner. In addition we are working with Mike Laudick, Laudick/Brown & Associates with previous experience in 40 plus projects.
	Project Start Date	2/1/2015
	Project End Date	3/1/2017
	Start within 12 months?	Yes
Project Timeline	Project Timeline	Phase One: Campaign Set-up, Organization & Planning-February 2015 to July 2015 Phase Two: Leadership Gift, Major Gift, and Special Gift Solicitations-August 2015 to May 2016 Phase Three: Community Campaign Period-June 2016 to July 2016 Building Phase: Ground-breaking and building of facility-July 2016 to March 2017
	Year 1 capital expenditures (\$)	\$163,633.04
Project Timeline	Year 2 capital expenditures (\$)	\$383,281.28



### Project Budget & Funding

<b>Year 3 capital expenditures (\$)</b>	\$651,028.56
<b>Year 4 capital expenditures (\$)</b>	\$651,028.56
<b>Year 5 capital expenditures (\$)</b>	\$651,028.56
<b>Total Capital Expenditures</b>	\$2,500,000.00
<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$300,000.00
<b>Total project budget</b>	\$2,800,000.00
<b>Description of Capital Expenditures</b>	Expected capital expenditures is estimated at \$2,500,000.
<b>Description of Ongoing Expenditures</b>	We would adjust our fundraising to meet the increase in operations. The \$300,000 on declining scale. Year One-\$ 100,000, Year Two-\$80,000, Year Three-\$60,000, Year Four-\$40,000, and Year Five-\$20,000
<b>Local public funding</b>	\$350,000.00
<b>Private funding</b>	\$1,800,000.00
<b>Non-profit funding</b>	\$150,000.00
<b>Other funding</b>	\$0.00
<b>RCI funding required?</b>	Yes
<b>RCI funding needed</b>	\$500,000.00
<b>RCI funding proportion of cap ex</b>	20%
<b>Total private funds</b>	\$1,950,000.00
<b>Private ratio calc</b>	70
<b>Total public funds</b>	\$850,000.00
<b>Public ratio calc</b>	30
<b>Other</b>	\$0.00
<b>Other ratio calc</b>	0
<b>Total funding</b>	\$2,800,000.00
<b>Variance between budget &amp; funding</b>	\$0.00
<b>Private/public/other funding ratio</b>	70 / 30 / 0

<b>Project impact and alignment with local or regional plans</b>	Our project will help make Marshall County a better place to work and raise a family. A new facility will aid families in providing a positive place for their children to learn and grow. We will be able to provide our services to a younger population of youth that have not been able to receive our services in the past. It will also serve as a tool to help integrate more Hispanics into our service population.
<b>Anticipated return on investment (%)</b>	0



Project Impact	<b>Description of anticipated return on investment</b>	<p>The Boys and Girls Club change lives and save lives in our community.</p> <p>Impact of better education through reduction in high school graduation rates among youth who attend the club on a regular basis as opposed to others who do not benefit from such services within the same demographic setting of the population in the same region.</p> <p>Impact of clubs' enrichment programs that enable youth to resolve conflicts and become more peaceful with their own peers and others in their communities by reducing youth crime rates and the savings that it generates in the community.</p> <p>Learning healthy living and its impact in reducing obesity and related disease that leads to lower productivity and rise of long-term chronic diseases.</p> <p>The impact of staff and volunteer training programs that enable them to become more productive and the impact of such increased productivity.</p> <p>Economically hard to measure impacts that help the economy in a tangible manner through incalculable quality of life impacts such as:</p> <ul style="list-style-type: none"> <li>&gt;Improving the quality of life by reduction of crime rates.</li> <li>&gt;Helping program attendees and their families to appreciate arts and creative talents within their community</li> <li>&gt;Creation of a wider social network for parents to relate to others in their community</li> <li>&gt;Building and promoting a greater sense of community</li> </ul>
	<b>Annual sales or other non-tax revenue generated (\$)</b>	0
	<b>Description of annual sales or other non-tax revenue generated</b>	N/A
	<b>Jobs created (if applicable)</b>	5
	<b>Description of jobs created (if applicable)</b>	<p>The project is expected to create 5-8 permanent jobs and numerous construction jobs during the building phase.</p> <p>A majority of our permanent jobs created would be our Youth Development Professionals. They are the most important component of any program serving youth. Well-trained and prepared staff members are able to foster better connections with youth and ensure meaningful experiences.</p>



## Project #42 Neighborhood Co-Operative

Project Ownership, Partners & Experience (Project Type & Readiness)	Project Information	
	<b>Project Contact</b>	Sara Hill, Executive Director
	<b>Project Description</b>	<p>Marshall County Neighborhood Co-Operative A pilot project that will enhance traditional, charitable services by incorporating a co-operative business model; whereby, client-recipients of our services will be invited to become members who contribute to and participate in targeted activities that are designed to build pathways out of poverty and into self-sufficiency.</p> <p>Members, volunteers, and staff will work collaboratively to deliver enhanced services:            -Our charitable agency provides the venue, community investment, and activities            -Our partners contribute specifically to support the co-op            -Our clients become members by participating in activities to gain enhanced access to client-shop food pantry, by-appointment clothes shopping, financial scholarships, and comprehensive life-skills support</p> <p>This framework will provide new perspectives and opportunities in poverty-based services.</p>
	<b>Project Location</b>	<p>Marshall County Neighborhood Center, Inc. 402 West Garro Street Plymouth, IN 46463</p> <p>Our services are centrally located in Plymouth, Indiana, and are available to anyone living in Marshall County.</p>
	<b>Project Category</b>	Quality of place
	<b>Industry Alignment</b>	Charitable/Non-profit
	<b>Project Partners</b>	<p>United Way of Marshall County: Collaboration and outreach opportunities with over 20 local member agencies.</p> <p>Marshall County Community Foundation: Financial support and advisement</p> <p>WorkOne/Workforce Development: We will enhance this partnership to attract new members to our co-op, while offering skills training and enhanced services.</p> <p>Township Trustee Network: These partnerships will build cohesiveness between public entity charities, and will act as liaisons to the rural areas of our county.</p> <p>Headstart: We will target households with preschool aged children (Especially Grandparents who are raising grandchildren), so that their membership will prevent gaps in basic needs and will better prepare the entire household for school readiness.</p> <p>Wal-Mart Corporation: Retail support in the form of purchase agreements and discounts</p>



<b>Project Experience</b>	The Marshall County Neighborhood Center has been in operation for over 30 years. Throughout that time, we have maintained a Community Food Pantry, clothing pantry, household assistance in the form of utility, rent, and mortgage support, free tax preparation, holiday assistance programs, and community referrals. Helping low-income households secure basic needs is our area of expertise.
	The co-operative model concept is new territory for us, however, we have the existing infrastructure and collaborative network in place to move in a more focused direction. Our strategic planning centers around empowering our disadvantaged populations to be learners and contributors in our communities.

<b>Project Timeline</b>	<b>Project Start Date</b>	3/1/2016
	<b>Project End Date</b>	12/10/2017
	<b>Start within 12 months?</b>	Yes
	<b>Project Timeline</b>	<p>At this point, we are in an exploration and research phase of development. We are revamping our building to accommodate the space needed to have a dedicated co-operative.</p> <p>By January 2016 we intend to open invitations to our clients, so that they can become members of "The Neighborhood Co-Op." We will take applications and by March 2016 we will have built a schedule of activities for member participation. From that point, through December 2017, we will conduct monthly activities that involve collecting monetary contributions from our membership, bulk purchasing of nutritious foods, volunteerism in food/clothing pantries, and individual financial counselling.</p> <p>Each Quarter (June, September, December of FY2016/March, June, September, December FY2017) we will evaluate through cost-benefit analysis, the viability of the project.</p> <p>In December of 2016 and 2017 we will report the project findings and propose any necessary changes to the programming.</p>

<b>Year 1 capital expenditures (\$)</b>	\$12,500.00
<b>Year 2 capital expenditures (\$)</b>	\$0.00
<b>Year 3 capital expenditures (\$)</b>	\$0.00
<b>Year 4 capital expenditures (\$)</b>	\$0.00
<b>Year 5 capital expenditures (\$)</b>	\$0.00
<b>Total Capital Expenditures</b>	\$12,500.00
<b>Ongoing expenditures for operations, maintenance, etc. (\$)</b>	\$22,500.00
<b>Total project budget</b>	\$35,000.00



Project Budget & Funding	<b>Description of Capital Expenditures</b>	<p>We will use our existing building for this project.</p> <p>Our capital expenditures are only to purchase new equipment (commercial capacity washers, dryers, refrigerator, and freezer), which will be used exclusively for our project.</p>
	<b>Description of Ongoing Expenditures</b>	<p>Our goal is to dedicate up to 20% of our existing operating budget toward building the Neighborhood Co-Op. This would represent between \$30,000 to \$35,000 on an annual basis. Our operating costs relate to maintaining facilities, paying qualified staff, and providing supplies for the project.</p> <p>During the pilot period, we hope to have special funds raised, so that we minimize the risk to our overall budget. Through on-going evaluations, we will determine the portion of our general budget that can be permanently dedicated to this endeavor.</p>
	<b>Local public funding</b>	\$2,500.00
	<b>Private funding</b>	\$12,000.00
	<b>Non-profit funding</b>	\$10,000.00
	<b>Other funding</b>	\$8,000.00
	<b>RCI funding required?</b>	Yes
	<b>RCI funding needed</b>	\$2,500.00
	<b>RCI funding proportion of cap ex</b>	20%
	<b>Total private funds</b>	\$22,000.00
	<b>Private ratio calc</b>	63
	<b>Total public funds</b>	\$5,000.00
	<b>Public ratio calc</b>	14
	<b>Other</b>	\$8,000.00
	<b>Other ratio calc</b>	23
	<b>Total funding</b>	\$35,000.00
	<b>Variance between budget &amp; funding</b>	\$0.00
	<b>Private/public/other funding ratio</b>	63 / 14 / 23



Project Impact	<b>Project impact and alignment with local or regional plans</b>	<p>Our Neighborhood Co-Op is an innovative approach to charity and social service. The traditional systems of giving rely on givers and recipients. It's a one-way system that allows for little interaction between groups and little opportunity for personal development. Although well-intended, this paradigm seems to perpetuate poverty. Given the percentage of impoverished and/or asset limited, income constrained households in our county, we seek to create a new type of charitable service that is built on a system of reciprocity.</p> <p>Everyone has something to contribute to our community – even those in need. The Neighborhood Co-Op will recognize the value of each member, and use that value as a strength in both receiving services and participating in meaningful activities. By providing this type of model, we will instill the very skills that are necessary to build a local economy. Grocery stores, banks, and other business institutions rely on this form of reciprocity in order to thrive in a local economy.</p> <p>Although this concept is not yet part of a broader local/regional plan, we are networking with key partners for future planning.</p>
	<b>Anticipated return on investment (%)</b>	10
	<b>Description of anticipated return on investment</b>	<p>Return on Investment is a difficult concept in charitable systems. At it's heart, our project looks to improve quality of life and the human capital of those we serve.</p> <p>However, because we are building a co-operative business model, we will collect a nominal contribution from our members each month. Our target is a membership of 20 families, who contribute \$10 per month toward food purchasing and co-op supplies. Over the course of 1 year, we will have gathered \$3,000 (all of which will reinvested into project activities). This would generate 10% of an annual budget of \$30,000.</p> <p>Each family will also volunteer 5 hours per month, providing a minimum of 1,200 service hours in a year's time.</p>
	<b>Annual sales or other non-tax revenue generated (\$)</b>	0
	<b>Description of annual sales or other non-tax revenue generated</b>	n/a
	<b>Jobs created (if applicable)</b>	0.5
	<b>Description of jobs created (if applicable)</b>	Upon successful completion of this project, we anticipate having the ability to hire 1 half-time staff position to exclusively administer this project.



## Project 43\_ND1 - St. Joseph River Hydropower

Project Ownership, Partners & Experience	Project Information	
	Project Contact	Tim Sexton, University of Notre Dame
	Project Description	Project Title: St. Joseph River Hydropower Project in Downtown South Bend The University will construct a 1.83 megawatt facility on the city-owned dam downtown south bend in 2016, completed in 2019 the facility would be conveyed to campus by way of an underground transmission line, a distance of about 1.5 miles. However, reduce campus carbon emissions, increase electric reliability, fix a portion of campus utility costs, provide academic research and create strong partnerships with local governments.
	Project Location	South Bend, IN, St. Joseph County
	Project Category	Infrastructure
	Industry Alignment	Energy
	Project Partners	University of Notre Dame City of South Bend
	Project Experience	Pending
Project Timeline	Project Start Date	1/1/2016
	Project End Date	12/31/2019
	Start within 12 months?	Yes
	Project Timeline	2016 Construction, full completion in 2019
Project Budget & Funding	Year 1 capital expenditures (\$)	\$5,000,000.00
	Year 2 capital expenditures (\$)	\$5,000,000.00
	Year 3 capital expenditures (\$)	\$5,000,000.00
	Year 4 capital expenditures (\$)	\$5,000,000.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$20,000,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$0.00
	Total project budget	\$20,000,000.00
	Description of Capital Expenditures	Construction costs
	Description of Ongoing Expenditures	N/A
	Total project budget	\$20,000,000.00
	Local public funding	\$0.00
	Private funding	\$20,000,000.00
	Non-profit funding	\$0.00
	Other funding	\$0.00
	RCI funding required?	No
	RCI funding needed	\$0.00
	RCI funding proportion of cap ex	0%
	Total funding	\$20,000,000.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	100 / 0 / 0



Project Impact	<b>Project impact and alignment with local or regional plans</b>	This project would reduce campus carbon emissions, increase electric reliability, fix a portion of campus utility costs, provide academic resiliency opportunities and create strong partnerships with local governments. The city received a federal exemption for a small hydro facility — less than 10 megawatts — on the dam in 1984. This is not the first time the city has attempted to harness the power of the dam for energy purposes. The city installed a small, 45-kilowatt turbine at Seitz Park, on the east side of the dam, in 2012, but it is not yet operational. “The turbine is operational from a technical standpoint, however, there is still some final testing and I&M requirements to be completed before regularly generating energy,” Dorau said in an email to the South Bend Tribune.
	<b>Anticipated return on investment (%)</b>	N/A
	<b>Description of anticipated return on investment</b>	N/A
	<b>Annual sales or other non-tax revenue generated (\$)</b>	N/A
	<b>Description of annual sales or other non-tax revenue generated</b>	N/A
	<b>Jobs created (if applicable)</b>	N/A
	<b>Description of jobs created (if applicable)</b>	N/A



### Project #44\_ND2 The Overlook at Notre Dame

Project Information		
Project Ownership, Partners & Experience	Project Contact	Tim Sexton, University of Notre Dame
	Project Description	Project Title: The Overlook at Notre Dame Phase two of a University-related apartment complex located in South Bend, at the east edge of Notre Dame's campus. This will add 120 apartments to the first and only community designed specifically for the MPA, Graduate and professional students, as researchers, staff and faculty of Notre Dame.
	Project Location	54651 Burdette St., South Bend, IN, St. Joseph County
	Project Category	Talent attraction
	Industry Alignment	N/A
	Project Partners	University of Notre Dame Overlook LLC
	Project Experience	Private sector development by Overlook LLC (experienced development team of Tim Troeger of multifamily to house graduate students in an off-campus setting; partnership with Notre Dame committing the land for the project.
Project Timeline		
Project Timeline	Project Start Date	8/1/2015
	Project End Date	12/31/2016
	Start within 12 months?	Yes
	Project Timeline	Construction 2015-2016. Open for fall 2016 semester.
Project Budget & Funding		
Project Budget & Funding	Year 1 capital expenditures (\$)	\$7,500,000.00
	Year 2 capital expenditures (\$)	\$7,500,000.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$15,000,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$0.00
	Total project budget	\$15,000,000.00
	Description of Capital Expenditures	Construction costs
	Description of Ongoing Expenditures	N/A
	Total project budget	\$15,000,000.00
	Local public funding	\$0.00
	Private funding	\$15,000,000.00
	Non-profit funding	\$0.00
	Other funding	\$0.00
	RCI funding required?	No
	RCI funding needed	\$0.00
	RCI funding proportion of cap ex	0%
	Total funding	\$15,000,000.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	100 / 0 / 0



Project Impact	Project impact and alignment with local or regional plans	This project aligns with Notre Dame's plans to provide more housing options for graduate students, staff, faculty, and researchers. Existing Overlook units are already sold out for the 2015-2016 academic year, thus there is demand for facilities. Since these units will be located adjacent to campus (versus directly on campus), residents will also be able to support South Bend amenities and businesses.
	Anticipated return on investment (%)	N/A
	Description of anticipated return on investment	N/A
	Annual sales or other non-tax revenue generated (\$)	N/A
	Description of annual sales or other non-tax revenue generated	N/A
	Jobs created (if applicable)	23
	Description of jobs created (if applicable)	23 jobs in retail and professional services will be generated, based on NAHB's April 2015 report, "The Economic Impact of Home Building in a Typical State"



## Project #45\_ND3 - Embassy Suites at Eddy Street Commons

Project Ownership, Partners & Experience	Project Information	
	Project Contact	Tim Sexton, University of Notre Dame
	Project Description	Project Title: Embassy Suites, Eddy Street Commons, South Bend 164 Room Embassy Suites to be constructed in Eddy Street Commons in South Bend, just north of the UND campus.
	Project Location	54651 Burdette St., South Bend, IN, St. Joseph County
	Project Category	Quality of place
	Industry Alignment	Hospitality
	Project Partners	University of Notre Dame Kite Realty Group, Indianapolis
	Project Experience	pending
Project Time	Project Start Date	1/1/2016
	Project End Date	12/31/2016
	Start within 12 months?	Yes
	Project Timeline	2016 Construction
Project Budget & Funding	Year 1 capital expenditures (\$)	\$25,000,000.00
	Year 2 capital expenditures (\$)	\$0.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$25,000,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$0.00
	Total project budget	\$25,000,000.00
	Description of Capital Expenditures	Construction costs
	Description of Ongoing Expenditures	N/A
	Total project budget	\$25,000,000.00
	Local public funding	\$0.00
	Private funding	\$25,000,000.00
	Non-profit funding	\$0.00
	Other funding	\$0.00
	RCI funding required?	No
	RCI funding needed	\$0.00
	RCI funding proportion of cap ex	0%
	Total funding	\$25,000,000.00
	Variance between budget & funding	\$0.00
	Private/public/other funding ratio	100 / 0 / 0



Project Impact	Project impact and alignment with local or regional plans	This project aligns with Notre Dame's plans to continue developing the Eddy Street Commons area.
	Anticipated return on investment (%)	24%
	Description of anticipated return on investment	annual room revenue (see below) / \$25M investment
	Annual sales or other non-tax revenue generated (\$)	\$6,000,000
	Description of annual sales or other non-tax revenue generated	Room revenue from overnight stays at the hotel. Assuming 164 at a conservative \$100/night for 365 nights, annual revenue = \$6M
	Jobs created (if applicable)	131.2
	Description of jobs created (if applicable)	Multiplier = 0.8 employees per room ( <a href="http://www.wsj.com/articles/SB97864492299550277">http://www.wsj.com/articles/SB97864492299550277</a> )



### Project #46 - South Bend Commerce Center Flats

Project Information		
Project Ownership, Partners & Experience (Project Type & Readiness)	Project Contact	David Matthews
	Project Description	South Bend Commerce Center Flats, is a mixed use development in the heart of downtown South Bend's East Bank neighborhood. The complex will add 250 residential units, a spot for a full service grocery store, and a location for a future pharmacy. The existing site has a 100 year old power plant that was adapted to an office building with athletic facilities in the 1980s. Today there are several technology and medical companies located on the block with excellent fiber internet connectivity.
	Project Location	401 E. Colfax Ave., South Bend, IN 46617, St. Joseph County
	Project Category	Talent Attraction
	Industry Alignment	Creative class & tech workers
	Project Partners	Matthews, LLC, David Matthews Markline Industries, John Morrison
	Project Experience	David Matthews is a leader in urban infill development with several multifamily projects completed throughout St. Joseph County, and in downtown South Bend.  Markline Industries is a national leader in modular multifamily housing, with it's corporate headquarters in Bristol, IN.

Project Timeline	Project Start Date	7/1/2016
	Project End Date	9/1/2018
	Start within 12 months?	Yes
	Project Timeline	250 multi family residential units with 65,000 square feet of ground floor retail space, an internal parking structure for 750 vehicles., 45,000 square feet of commercial space in addition to 90,000 square feet of existing multi-tenant medical & technology office space.


Project Budget & Funding	Year 1 capital expenditures (\$)	\$7,875,000.00
	Year 2 capital expenditures (\$)	\$27,600,000.00
	Year 3 capital expenditures (\$)	\$0.00
	Year 4 capital expenditures (\$)	\$0.00
	Year 5 capital expenditures (\$)	\$0.00
	Total Capital Expenditures	\$35,475,000.00
	Ongoing expenditures for operations, maintenance, etc. (\$)	\$0.00
	Total project budget	\$35,475,000.00
	Description of Capital Expenditures	Parking structure and infrastructure installation = \$7.875M 1st floor commercial rough in (\$2600000), and 2nd - 5th floor residential units \$25000000., total of 27600000
	Description of Ongoing Expenditures	N/A
	Local public funding	\$7,095,000.00
	Private funding	\$26,606,250.00
	Non-profit funding	\$0.00
	Other funding	\$0.00



<b>RCI funding required?</b>	Yes
<b>RCI funding needed</b>	\$7,095,000.00
<b>RCI funding proportion of cap ex</b>	20%
<b>Total private funds</b>	\$26,606,250.00
<b>Private ratio calc</b>	65
<b>Total public funds</b>	\$14,190,000.00
<b>Public ratio calc</b>	35
<b>Other</b>	\$0.00
<b>Other ratio calc</b>	0
<b>Total funding</b>	\$40,796,250.00
<b>Variance between budget &amp; funding</b>	\$5,321,250.00
<b>Private/public/other funding ratio</b>	65 / 35 / 0

<b>Project impact and alignment with local or regional plans</b>	Downtown South Bend is the north central regions hub for cultural and recreation activities. It has the largest and most dense workforce population, but suffers from a lack of residential options, and a residential core. Part of the challenge with building additional new residential projects is the lack of a central core desirable for residents relocating from outside the state. This development will address these concerns by helping push the downtown population over the tipping point to make the demographics attractive to full service grocery and pharmacies, while also increasing the development potential of the surrounding under utilized land.
<b>Anticipated return on investment (%)</b>	23.46%
<b>Description of anticipated return on investment</b>	Total annual tax of: \$1,664,696.00 with an state investment of: \$7,095,000.00 \$78,000.00 3% property tax on commercial real estate \$500,000.00 2% property tax on residential real estate \$1,086,696.00 Grocery tax revenue (sales tax, corporate income tax, employee tax) \$1,664,696.00 Total Annual Tax
<b>Annual sales or other non-tax revenue generated (\$)</b>	Grocery store sales of: \$18,111,600.00
<b>Description of annual sales or other non-tax revenue generated</b>	Grocery: sales tax is applicable to 10% of gross sales (non food items).
<b>Jobs created (if applicable)</b>	Residential: 4FTE (leasing, admin, maintenance), Commercial: 80FTE
<b>Description of jobs created (if applicable)</b>	2 leasing agents, 2 maintenance 20 full time salary in the grocery, 60 part time hourly





No 113



MAKING

# NORTHERN INDIANA

TECHNOLOGICALLY  
RELEVANT

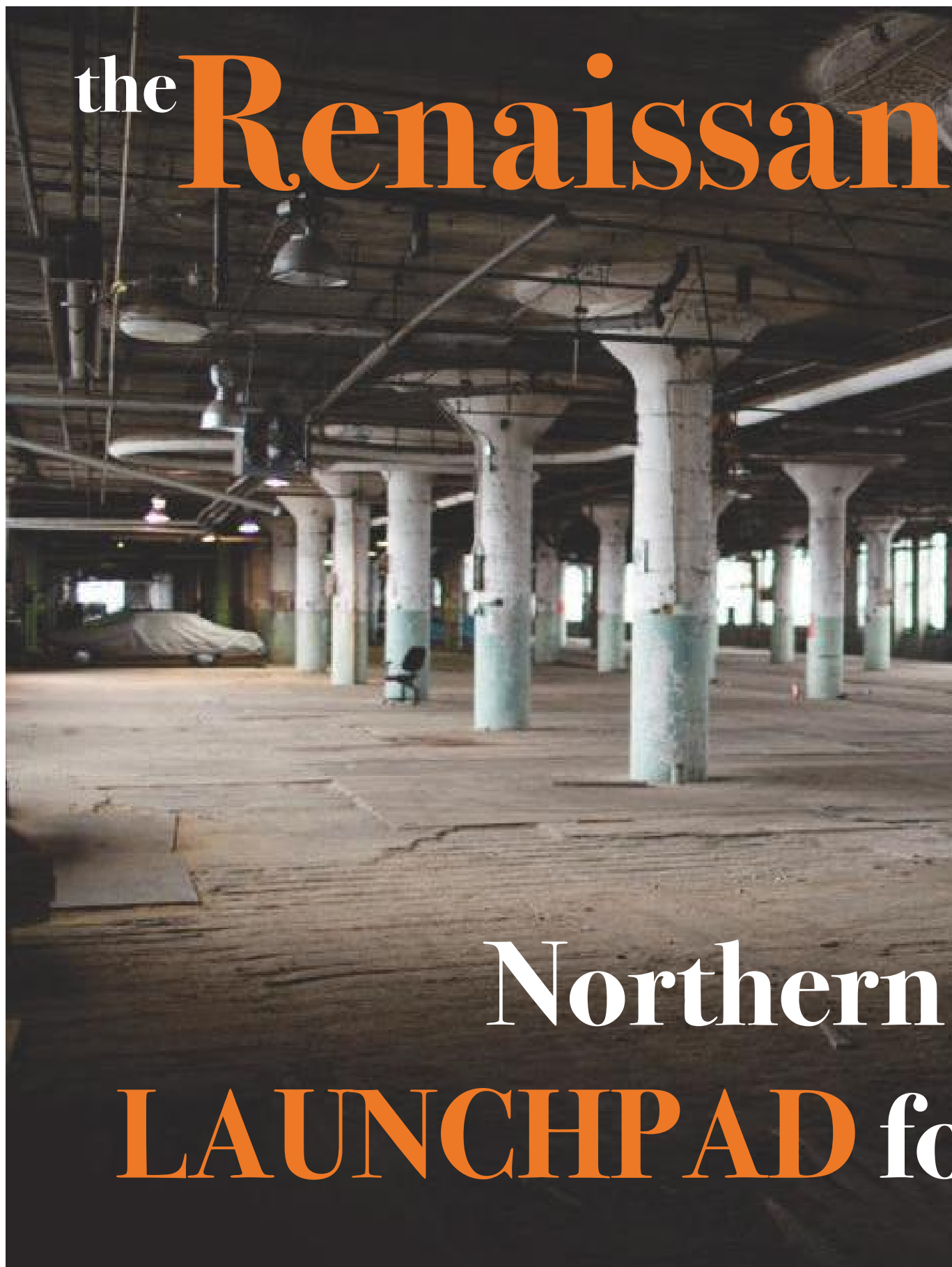


This project's goal is to make northern Indiana technologically relevant by building the midwest's largest multi-use tech hub and educating workforce to build and attract talent to our region. By democratizing entrepreneurship, design, engineering, fabrication and education, we give our region access to innovation and equipment uniquely arranged to fit the purposes and needs of our community. No 113 will incubate and host multiple education initiatives that provide hands-on, career exploration activities, training for students, workers and veterans seeking information technology and manufacturing careers, and promote entrepreneurship among students. No 113 is dedicated to developing the next generation of entrepreneurs and innovators.

- the team

# No 113





the Renaissance

Northern  
LAUNCHPAD for



# ce District

# Indiana's r INNOVATION



# Consider the Past



## Reclaiming Our Heritage

The reutilization and reclamation of the only remaining Studebaker manufacturing facility honors the legacy of the company that built South Bend and embodies the continuity of innovation that began in the mid 1800s when Clem and Henry Studebaker opened their first company near the banks of the St. Joseph River. From its origins as a wagon company, Studebaker grew to become the 4th largest automobile manufacturer in the US, employing 23,000 people at its height. Today, that innovation lives on through the adaptive reuse of Building 84; transforming a once abandoned facility into a large scale, sustainably designed tech hub that promises to spur a second economic boom for South Bend.



ADRIAN SMITH | CORDON GILL  
ARCHITECTS  
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# Evaluate the Present

## Space Reutilization

Like its automobiles, the Studebaker manufacturing plant was built to last. Designed by renowned architect Alfred Kahn, Building 84 offers nearly a million square feet featuring poured in place concrete, maple hardwood flooring, and walls of 12' high windows.

Like its automobiles, the Studebaker manufacturing plant was built to last. Designed by renowned architect Alfred Kahn, Building 84 offers nearly a million square feet featuring poured in place concrete, maple hardwood flooring, and walls of 12' windows that wash the expansive space in natural light. Once slated for demolition, the reuse of this space is now a major catalyst of economic activity. By leveraging our geographical and competitive advantages, and consistently innovating with technology, we are accelerating economic growth in South Bend and preserving a landmark building.

flooring, and walls of  
wash the expansive s  
light. Once slated for  
reuse of this space is  
catalyst of economic  
leveraging our geogr  
competitive advanta  
consistently innovat  
technology, we are c  
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preserving a landmar

# te the Future

renaissancedistrict  
Serial Rendering

RENAISSANCE DISTRICT  
Rd. 4th Floor  
2014.10.03  
7



UNION STATION  
provides  
**SPACE  
POWER  
CONNECTIVITY**  
**No 113**  
is the hub of  
**INNOVATION**



**LARGEST**  
privately held  
continuously  
operated,  
**DATA CENTER**  
in the **USA**

**1.3**  
**million**  
square foot  
**campus**

Top **33**  
**FASTEST**  
**GROWING**  
**COMPANIES**  
in **INDIANA**  
( 2 0 1 3 )

**100k**  
square foot  
**FACILITY**

**HIGHLY**  
**SECURE**  
**SSAE16**  
compliant  
operation

**7000+**  
**FIBERS**

**25**  
national  
carriers

MIDWEST'S  
**LARGEST**  
mixed use  
**TECH-**  
**NOLOGY**  
campus

**80** MW  
**POWER**  
consumption  
**30** acre  
DEVELOPMENT  
top **30**  
**DATA**  
**CENTER**  
in the **USA**

**+3000**  
**technology**  
**workers**

**VIBRANT**  
high tech  
**cultural**  
**center**





# An Entrepreneurial Paradigm For Regional Economic Development

## History

In 2012 we leveraged the University of Notre Dame's ESTEEM program to tackle issues of brain drain and economic development.

EnFocus has created an innovative platform that combines fellowship consulting and sponsorship, internship program development, regional talent placement, and entrepreneurship.

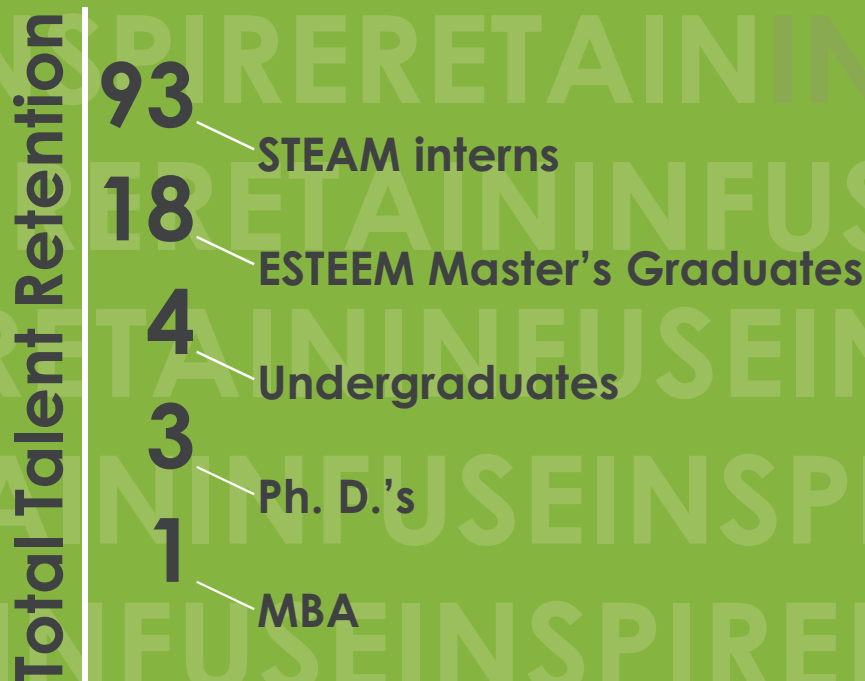
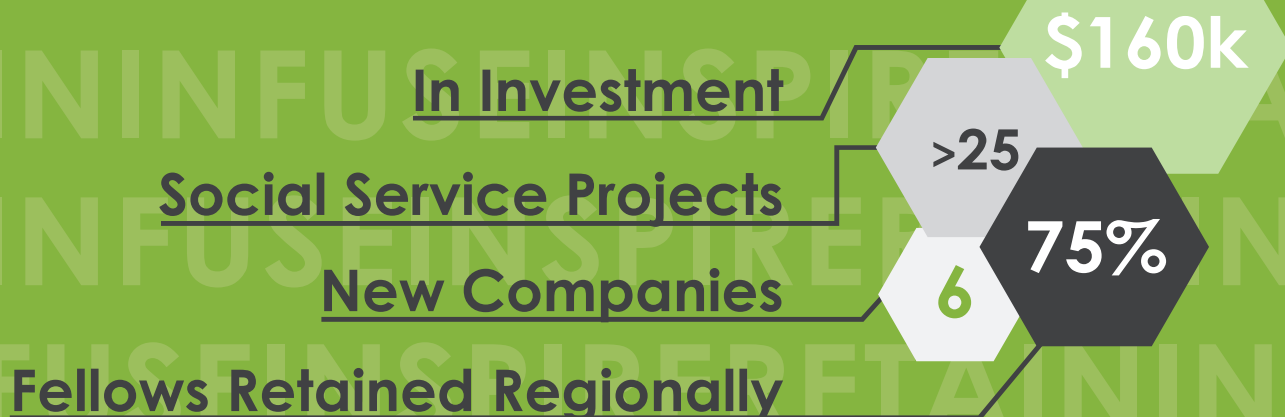


## Vision

Establish sustainability for ongoing viability.  
Institutionalize the vibrant young professional culture.  
Deploy a sustainable model that expands the set of entrepreneurial activities available to top talent looking to stay in the region.  
Replicate the success of the original South Bend regional model.







“ The enFocus fellows provided a fresh perspective, creative intelligence, and technological skill to help us deliver better government to our residents. This is an exciting program that will continue to grow in value and importance for our community...”

Pete Buttigieg | Mayor  
 City of South Bend





# HEALL

## Health Education Active Learning Lab



**HEALL** fills the need for clinical education through simulated training environments for the medicine, nursing, and emergency responder sectors through the use of modern replicas of three patient care environments.

**Inpatient Care** (Doctor's Office/Clinic)

**Emergency Room** (Trauma Center)

**Virtual Hospital** (ICU/Neonatal/Surgery)

These simulations instruct and facilitate active learning while measuring student performance and competencies which leads to improved health care training for a growing regional health care work force and improved health care for the region by advanced, well-trained clinical practitioners.



**Job Growth:**

**National Health Care Employment** is projected to increase by **10.8%** over the next decade (US Bureau of Labor Statistics)

For the IU South Bend region, largest expected demand in job **growth** is in **health care practitioners** and technical occupations – estimated to grow **17%**, adding 2,421 new jobs, and 3,442 replacement jobs (Deloitte Study)

Vera Z. Dwyer of Health Sciences will add **5** new **graduate programs in nursing** alone over next five years

IU School of Medicine completing a phased-in **30% expansion** of **med school students** – to be complete by 2016

## Economic Impact:

Average annual payroll for HEALL Staff - \$725,000

Average annual third party user fees - \$150,000

Student/User Spending - \$1,800,000 (based on \$10/day/student)

Partners' Tuition and Fees - \$3,000,000

## Regional Partners:

IU South Bend Vera Z. Dwyer College of Health Sciences  
 IU School of Medicine (South Bend and Northwest)  
 IU Northwest College of Health and Human Services  
 Saint Mary's College Dept. of Nursing  
 Ivy Tech Community College  
 Goshen College  
 Bethel College  
 Beacon Health Systems  
 St. Joseph Regional Medical Center  
 IU Health Goshen Hospital  
 Third Party EMS/Homeland Security/FEMA/ Nursing Users



# Advanced Manufacturing & Design

DTAC will work with industry and educational and training partners to provide opportunities to expand our region's competencies and opportunities for our region's high schools, Purdue University's Technical Assistance Center, and corporate users. Students and trainees will have the opportunity to use the equipment and machinery and gain real world experience. Through training, the DTAC will have design and digital manufacturing capabilities for entrepreneurs and businesses and utilizing its equipment for production runs to incubate new products or businesses in the region. The DTAC will partner with a design firm, like AutoDesk, and an engineering firm, like Engineering, educational institutions like Vincennes University and centers like the Digital Manufacturing Institute.

## Springboard<sup>3D</sup>

Springboard 3D promotes additive manufacturing in northern Indiana by managing and operating multiple 3D technologies on behalf of educational, civic, and for-profit institutions. The machines are used to produce printed parts for business and academic clients while creating an educational opportunity for students of all ages. Students gain hands-on experience operating professional and production equipment while also learning the business side of additive manufacturing. We advise businesses on implementation strategies and provide employee training.





# Design Center

providers to create opportunities for our Program, and ability to use the In addition to g equipment available for prototyping and low-level the region. DTAC aspires to g firm, like Springboard y and Rose Holman Ventures,



# Strategy

Implementation Strategy: Provide reduced cost space, environment and a catalytic capital commitment to bring the top operational partners to our area's industry.



# PURDUE

## POLYTECHNIC

### MISSION

To inspire, educate, and mentor students through learn-by-doing and integrating study, preparing graduates for success as future technology innovators and industry leaders; and to advance trans-disciplinary learning, engagement, and use-inspired research addressing important state and global challenges.

Relevant Degrees  
Local Impact  
Lasting Results







# Project Lead the Way Academy

## Vision

Project Lead The Way Academy. 113 will incubate the Project Lead The Way Academy to provide area students additional access to the courses and resources provided by Project Lead The Way (PLTW), the nation's leader in STEM-based co-curriculum for schools. This Academy will have trained teachers from area schools and equipment available to provide base-level courses in Engineering, Biomedical Sciences, and Computer Science for public, private or home schools that currently do not have adequate resources to implement PLTW high school and middle school curriculum. Further, the Academy will provide after-school and summer courses for students who desire advanced courses currently unavailable at their respective schools. Several PLTW courses qualify as dual-credit or AP courses that encourage students to pursue a post-secondary degree or certificate. Because this initiative is designed to assist area schools that do not have the resources to independently implement Project Lead the Way courses, this initiative will likely serve a disproportionate level of low-income students.

<https://www.pltw.org/>





# MSTCi

Michiana Science and  
Technology Center, inc.

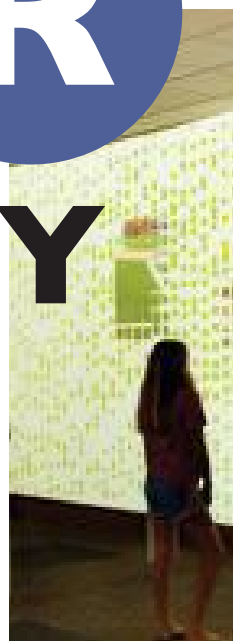
MSTCi is an education based, non-profit organization in the Michiana region designed to nurture interest in **SCIENCE, TECHNOLOGY, ENGINEERING,** and **MATHEMATICS** (STEM) learning by

# S T R FACTORY

**The STREAM Factory** will be the primary STEM education hub in northern Indiana and is designed around the 8 economic sectors of the region to develop a thriving STEM workforce for current and future industries and employers.

The facility will provide an innovative exhibit space for students, career development classrooms, laboratory space, and a STEM resource area with a leading library for educators and the community. Additionally, the STREAM Factory will provide continued professional development courses for K-12 educators and parents.

The STREAM Factory exhibits will showcase regional business in the **8 IDENTIFIED ECONOMIC SECTORS** that rely on and recruit a STEM workforce. By providing this targeted hands-on education experience, the facility services both the educational and industry needs of northern Indiana.



## Michiana Science and Tech

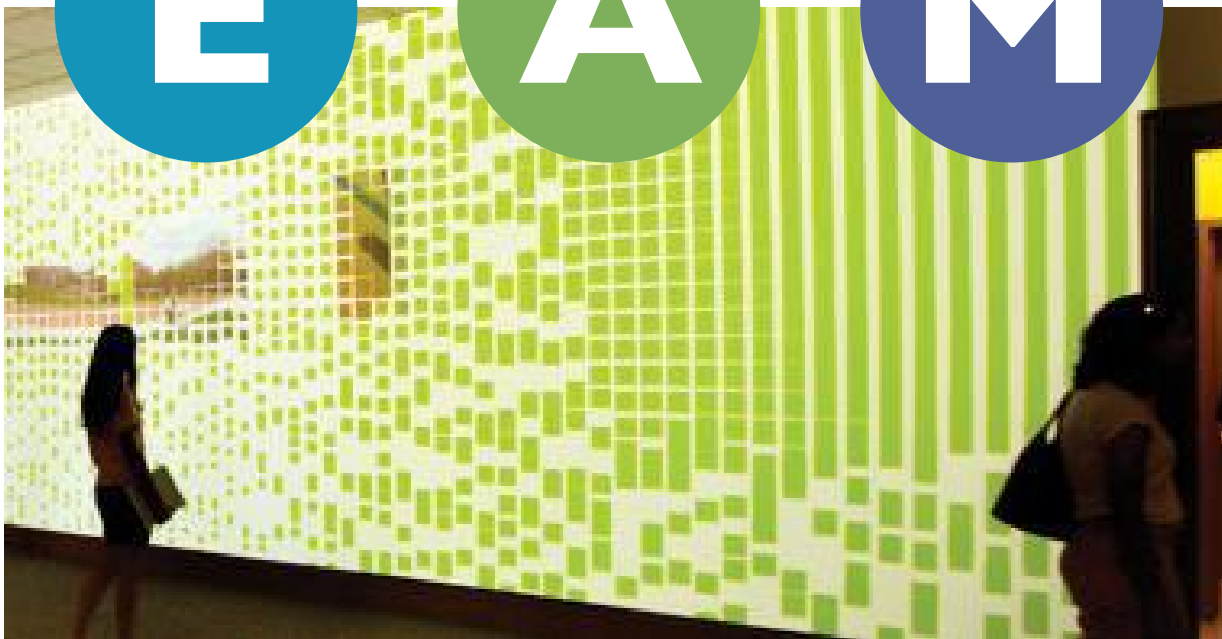


→ **1** Providing **INTERACTIVE EXPERIENCES**  
and **SUSTAINED ENGAGEMENT**

Illuminating pathways to **STEM CAREERS**

**2**  
**3** Developing academic, business  
and community **PARTNERSHIPS**

**E A M**



- 1) Academia & Research  
2) Accounting, Finance, Business, & Real Estate  
3) Agriculture, Food, and Culinary Arts  
4) Art & Architecture  
5) Engineering, Manufacturing & Construction  
6) Government, Law, & Logistics  
7) Health & Medicine  
8) Information Technology

nology Center, Incorporated





## ST. JOE CEO

St. Joe CEO is an **entrepreneurship education** program that seeks to prepare people, especially youth, to be responsible, enterprising individuals who become **entrepreneurs** or **entrepreneurial thinkers** and contribute to

## ECONOMIC DEVELOPMENT & SUSTAINABLE COMMUNITIES.

The St. Joe CEO program is much more than a textbook course. Students are immersed in real life learning experiences with the opportunity to **take risks**, **manage the results** and **LEARN FROM THE OUTCOMES**. St. Joe CEO is partnering with **Gallup** to utilize the Entrepreneurial Profile Assessment which aims to help find and develop our best and most talented business builders in the region.



## SCHOOL

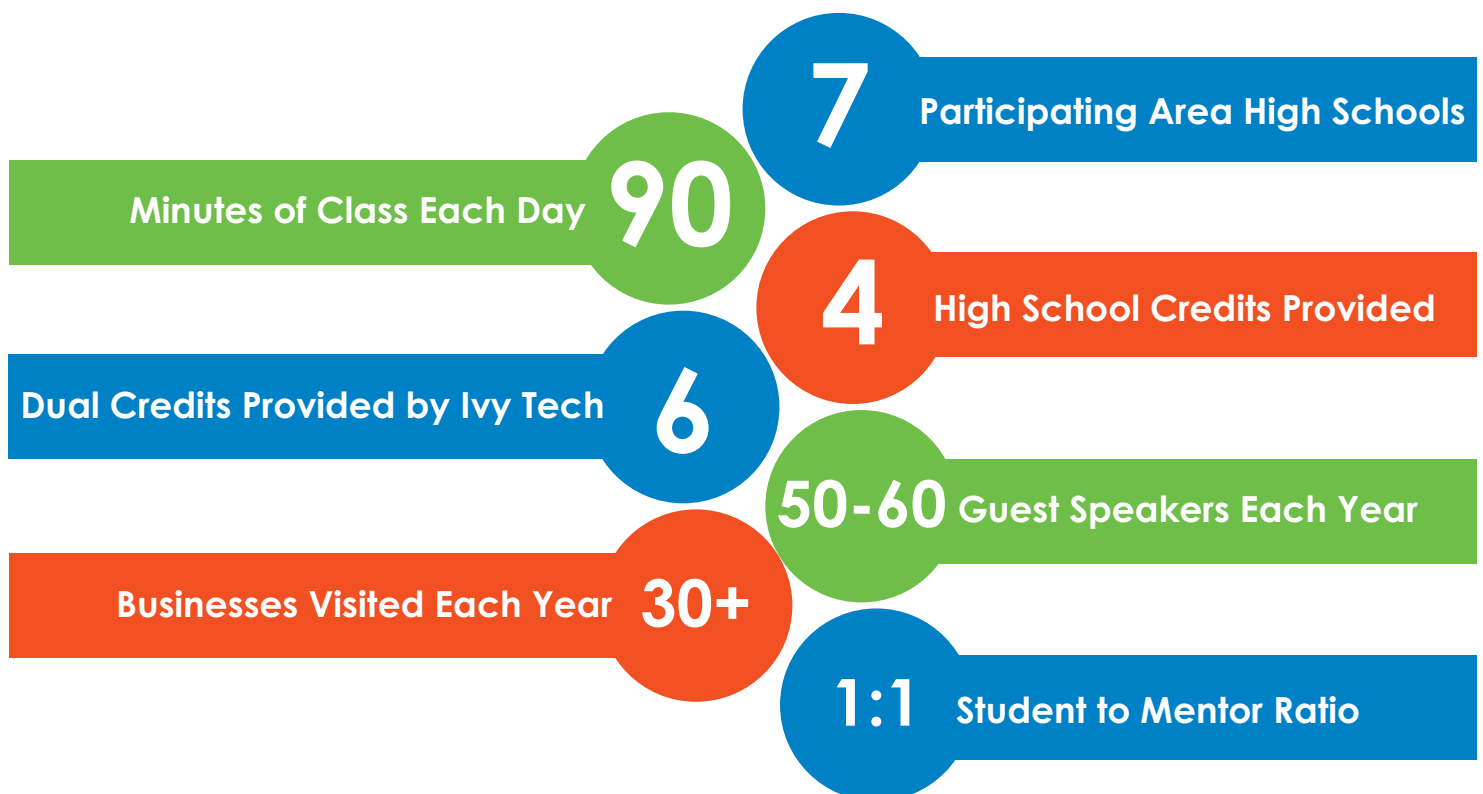
St. Joe CEO serves students from public and private high schools and is open to any high school junior or senior in the county.

## BUSINESS

St. Joe CEO is funded by business investors, utilizes area businesses as classrooms, and emphasizes real business experience.

## STUDENT

Students are selected through a rigorous application process, are provided the opportunity to start their own business, and host an annual trade show to showcase student businesses







South Bend Code School aims to make South Bend a  
**CITY THAT CODES**  
 by breaking the barrier between people and technology

***Our mission*** has been focused around teaching people from all walks of life that **code is a tool used to build your imagination**. In our program, we give people real world experience building portfolio viable applications and equip them with the web development skills needed to **obtain jobs** at technology focused companies.

## 5 year projection

Employees Trained - **275**

Revenue - **\$3m**

Total Community Impact - **\$35.5m**



## Summer 2015:

The South Bend Code School ran a 5 week program in which 18 children learned how to code. They built applications for the City of South Bend focused around stopping violence. At the end of the 5 weeks, the class presented their projects to Mayor Pete Buttigieg as well as the Google office in Chicago. The applications are online and can be viewed at:



[southbendcodeschool.com](http://southbendcodeschool.com)

## Code Schools by the Numbers\*

Average student's Increase in Salary:	<b>\$25,000</b>
Average Program Length:	<b>10 wks</b>
Average Cost of Full Time Code School:	<b>\$9,900</b>
Growth in the Code School Market:	<b>2.8x</b>
Tuition Revenue from 2104 (estimated):	<b>\$59m</b>

\*pulled from courserereport.com

## Code in the Region

**20** - tech startups

**\$62,702** - average wage (2011)

**21%** - projected 5 year increase in jobs



**CITY OF SOUTH BEND**

PETE BUTTIGIEG, MAYOR  
Office of the Mayor

Dear Students:

Welcome to South Bend. We're pleased to be a collegiate community with an environment that integrates city and university, students and residents alike. Just as you are a part of the University of Notre Dame now, while you're in South Bend—whether it's for the next four years, or the next 40 years—we want you to feel like it's home.

There are opportunities for educational enrichment, professional development, community service, entertainment, and recreation all at your fingertips here. Take advantage. Both you and our community will be the richer for it.

This is an exciting time in South Bend. New businesses are opening and bringing good jobs and revitalization with them. The opportunities available now have made choosing South Bend as the place to live and work post-graduation a more common choice.

Young people are driving a lot of the cultural, social, and economic growth South Bend is experiencing. In ways you might not initially realize, you'll benefit from the efforts of many not much older than you during your time here. You'll also be encouraged to contribute to our city's life and future.

An openness to ideas and willingness to innovate have been essential to South Bend's recent transformation—and the diversity and vitality, the intellect and the insight that students offer, is sought after to keep us moving forward.

Welcome to the neighborhood, and on behalf of the City of South Bend, welcome home.

Sincerely,

Pete Buttigieg  
Mayor



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America's industrial heartland

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## Reinvention in the rust belt

America's industrial heartland

## Reinvention in the rust belt

Do former industrial cities in the Midwest have a future?

Jul 11th 2015 | GALENA, ILLINOIS, GARY, INDIANA AND SOUTH BEND, INDIANA | From the print edition



551



156



"THEIR biggest concern is the abandoned buildings," says Karen Freeman-Wilson, the Democratic mayor of Gary. She holds weekly one-to-ones with residents, 15 minutes each, to find out what most worries them. Gary, which is south-east of Chicago on Lake Michigan, has some 5,000 boarded-up houses, around a quarter of the city's buildings. They are an eyesore, many of them are dangerous and criminals like to hide in them.

Ms Freeman-Wilson is devoted to her job; she ran three times to get it until she won in 2011. Before that, she was the state's attorney-general. She wants to reinvigorate the city she was born in and, crucially, give citizens confidence in its future. One of her recent victories was the demolition of Gary's tallest building, a former Sheraton hotel once dubbed "the gateway to Gary's future", which, for three decades, loomed as a vacant skeleton next to city hall, a daily reminder of the city's descent into urban blight.



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## Reinvention in the rust belt

Reviving it is a tall order, and progress is sometimes frustratingly slow. Gary is a miniature version of Detroit, an industrial city hit brutally by the decline of the heavy industry that had sustained it for decades. It struggles with poverty, high crime rates, unemployment, poor schools and a general sense of hopelessness. The population, which is 85% black, has shrunk from 180,000 in the 1960s to fewer than 79,000 today. Its poverty rate is 38%; both the per-capita murder rate and the high-school dropout rate are among the highest in the country. The official unemployment rate is 6.5%, but real unemployment is 30%, says Ms Freeman-Wilson, when you include the many people who have never had a job.

Gary used to be known as "Magic City". It was a bustling, prosperous metropolis with handsome buildings lining Broadway, decent public schools, well-stocked flower beds in dozens of parks and numerous shops, restaurants, cafés and movie theatres. This elegance had solid underpinnings: it was founded in 1906 by the United States Steel Corporation for Gary Works, its new plant, and named after Elbert Henry Gary, co-founder of US Steel. Its fortunes, however, rose and fell with those of the industry. When US Steel struggled to compete with cheaper steel from Asia, it laid off workers. Today Gary Works employs around 5,000 people compared with 30,000 in the 1970s. And the lay-offs continue: in April US Steel fired more than 300 workers as it shut down its own, Gary-based, coke plant.

The city is one of many former industrial hubs in the rust belt, a term which, according to a report for the "Industrial Cities Initiative" put together by Chicago's Federal Reserve Bank, often turns out to be an epitaph for cities large and small throughout America's north-east and Midwest. Their decline started 40 years ago and has accelerated over the past decade. In 1970 employment in manufacturing in America, much of it in the Midwest, accounted for about a third of the labour

### In this section

#### Reinvention in the rust belt

Building Aframerica

Back on the beat

A delicate balance

Is lemonade legal?

The Puerto Rico problem

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### Related topics

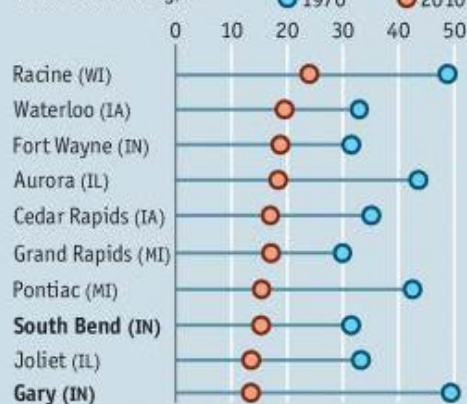
Indiana

Chicago

United States

### Spanners down

Employed workers aged 16 and over working in manufacturing, %



Sources: Federal Reserve Bank of Chicago;



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## Reinvention in the rust belt

force. Since then its share has dropped continuously until, in 2010, it accounted for around a tenth of workers. It is now recovering in places, but only in baby steps.

Bruce Katz at the Brookings Institution, a think-tank, says that industrial cities must reinvent themselves to survive. His suggestions are not new, but almost a

return to fundamentals: they have to use their geographical advantages (meaning, these days, tourism and logistics rather than geology) and build as much as possible on "anchor" institutions such as universities and hospitals. What they must not do is distract themselves by constructing an enormous stadium or a theme park that may turn into a white elephant. It is a very rare city that has helped itself by hosting international sports.

A good example of Mr Katz's first precept, making full use of geographical assets, can be found in Galena, Illinois. Galena is a smallish city that lies the whole breadth of Illinois away from Gary, on the Mississippi that marks the Iowa border. Its sudden decline came earlier than in other midwestern industrial towns. In the early 19th century it was a thriving lead-mining centre and a steamboat transport hub that was bigger than Chicago. Then, in the 1850s and 1860s, zinc supplanted lead and railways took over from steamboats. "Everything changed by the time of the civil war," says Daryl Watson of the local historical society. Galena's last hurrah was the triumphant return in 1865 of the Union general, Ulysses Grant, to the town he had made his home before the start of the war.

In subsequent decades Galena struggled—and shrank. In its heyday the city had 12,000 inhabitants; today there are just 3,500. But in the 1960s it found a new way to earn a living by making the most of its looks: the lovingly restored historical centre and the verdant, hilly landscape behind it, a unique feature of the "Driftless Area" in the otherwise pancake-flat Midwest. Today Galena has around 1m visitors a year. More than 80% of the city's downtown buildings are on the National Register for Historic Places. Thanks to restrictions on electric signs, Main Street looks more like a well-preserved town in Europe, with plentiful craft shops and a lot of cast iron. It has done well.

The second possible route to survival for the Midwest's battered cities—building heavily on notable local institutions—can be seen about 60 miles east of Gary, in South Bend, Indiana. South Bend, too, started to decline long ago. It used to be a company town: the





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## Reinvention in the rust belt

headquarters of Studebaker, one of the big four American carmakers in the first half of the 20th century. Yet Studebaker struggled with the modern era: it went bankrupt during the Depression and then faced even more problems in the 1950s, thanks to poor labour relations and fierce competition from carmakers in Detroit. When the firm permanently closed its plant in 1963, thousands of local men and women lost their jobs. "Today South Bend is a company town without a company," says Pete Buttigieg, the city's Democratic mayor.

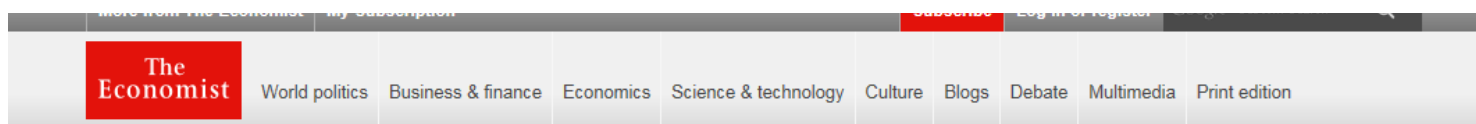
Yet South Bend has "anchor" institutions in Notre Dame, one of America's leading Catholic universities, and the Memorial Hospital of South Bend. Until recently, Notre Dame showed little interest in its hometown; but this is changing as administrators realise that when students apply to a college, they also care what the town surrounding it can offer. The university, which is South Bend's biggest employer, is now working more closely with the government to channel investment into the city.

Mr Buttigieg does not want South Bend to reinvent itself as a company town—dependence on a single employer proved too devastating. Instead he is trying to lure technology and data companies with promises of cheap power, low corporate taxes and cold weather (data centres need cool temperatures as they generate so much heat). In recent years some of Studebaker's plants have been torn down and an empty site has been named Ignition Park, which Mr Buttigieg hopes will become a leafy hub for high-tech companies. (Ignition Park has a sister site, Innovation Park, developed by Notre Dame across the street from its campus.) Ignition Park's second confirmed tenant is the Notre Dame Turbomachinery Facility, a joint venture between the university and five public and private partners, which will research and test gas-turbine engines used by military and commercial aeroplanes.

### Powers of persuasion

South Bend still has a long way to go. Studebaker's vast half-derelict factory buildings continue to dominate the cityscape. The city's rate of violent crime remains nearly twice the Indiana average; 28% of its inhabitants live below the poverty line and 75% of children in public schools are eligible for the free lunches offered to low-income families. Tensions occasionally erupt between the city's ethnic groups: South Bend's inhabitants are 13% Latino, 27% black and 60% white, primarily of Polish, Hungarian, German and Irish descent. "Holding the community together is one of my biggest challenges," says Mr Buttigieg, who regularly compares notes on this and other topics with his counterpart in Gary.





America's industrial heartland

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## Reinvention in the rust belt

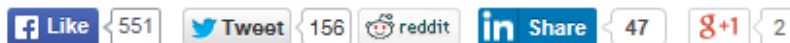
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Mr Buttigieg and Ms Freeman-Wilson are both seeking re-election later this year. Both are likely to be re-elected and get a chance to continue what they started. Not long ago, after Gary lost more than half its annual budget because of a change in Indiana's property-tax rules, city officials felt so bleak that they mooted a plan to cut services for almost half the city (and move everyone to the half that would still receive them). But Gary is now starting to get help from both the state and federal governments, thanks in part to Ms Freeman-Wilson's powers of persuasion. Last year the White House announced that it was one of seven distressed cities that will receive federal funds through the "Strong Cities, Strong Communities" initiative. It has received \$6m from the state government for the demolition of abandoned buildings. And it is applying for a \$21m grant from a special programme run by the federal Transport Department to encourage investment in public transport.

Gary has an international airport, three railway lines and direct links to four of the nation's busiest interstate highways. It sits on the shore of one of the world's biggest lakes and just 24 miles south-east of downtown Chicago. It lost time and wasted federal funds, under a previous mayor, by building a baseball stadium and hosting Donald Trump's Miss America beauty pageant. But as a transport hub, so close to America's third-biggest city, it may have a chance to remake itself rather than just manage its decline.

From the print edition: United States





## ECONOMIC IMPACT

GROWTH • COLLABORATION • ENGAGEMENT

## TEAMWORK

The vibrant relationships with community organizations and institutions make a wide range of services available to local residents. These partnerships also give Notre Dame students ample opportunities for community-based learning.

## BUILDING PARTNERSHIPS

Notre Dame believes that learning takes place not only in classrooms and laboratories but also through experience, which is why active engagement in the community is essential.

University courses offering opportunities for community-based learning have more than doubled from 80 in 2005-06 to 196 in 2013-14. The 2013-14 enrollment in these courses totaled 3,338—27.5 percent of all University students.

These courses range from a case study of immigration in South Bend to an exploration of the criminal justice system alongside prisoners at the Westville Correctional Facility. Research collaboration is also growing, with examples ranging from chemical engineers assessing lead contamination in area homes to designing new logos and identity pieces for local nonprofits.

196

**courses at Notre Dame, more than double the number from five years earlier, include community-based learning opportunities**

## A FUTURE TOGETHER

Notre Dame's contribution to the ongoing growth, transition, and service of the economy of South Bend, St. Joseph County, and Indiana is certain to continue during the next decade. Over the next three years, Notre Dame will undergo the largest building boom in University history, spending \$712 million on construction, or an average of more than \$237 million each year. Besides projects already started, future plans call for a new School of Architecture and the next phase of development at Innovation Park.

Research spending at Notre Dame grew by 360 percent since 2001, leading to increased hiring and more students—and a foundation of innovation that can lead to the development of new products, services, jobs, and businesses. A new emphasis on technology transfer and business development, now backed by new funding opportunities, has created a "entrepreneurial ecosystem" that is expanding from Notre Dame's Innovation Park to the city's Ignition Park. The future of the relationship between the community and Notre Dame has never appeared brighter.



\$237,000,000

**per year in construction spending over the next three years at Notre Dame**



### NOTRE DAME AVENUE



Studebaker upholstered cars on the sixth floor of its massive Assembly Building, aka No. 84 or the Ivy Tower, where Kevin Smith '78 foresees a high-tech business hub.

## Rising from the ashes

As South Bend finds the future, ND's part shifts from Rockne to research.

BY BRENDAN O'SHAUGHNESSY '93

In 1852, Clement Studebaker and his brother started a blacksmith forge in South Bend, Indiana, with assets of \$68 to their name. Over a half-century, the family business grew into the world's largest maker of horse-drawn wagons and buggies. Studebaker sales were nearly \$3 million in 1897 when Clement's son informed him that times were changing.

"We better produce a motor car or we'll be ancient history," said Clement Jr. "Non-sense," his father replied, according to one company historian. The horseless carriage was a "novelty," and no carmaker had made

*Brendan O'Shaughnessy, who works in communications for Notre Dame, is a former teacher and Indianapolis Star reporter.*

even \$300 that year. But the younger generation kept pushing, and Studebaker produced its first automobile within a year of Clement Senior's death in 1901. His brother John, the last of the founders, still wasn't convinced, pronouncing motor cars "clumsy, dangerous, noisy brutes which stink to high heaven, break down at the worst possible moment and are a public nuisance." Yet John presided over the company's timely transformation.

There were more than 5,000 makers of horse-drawn vehicles in America at the turn of the 20<sup>th</sup> century, but only Studebaker made a successful transition to manufacturing automobiles, driving their business and the country from the agricultural era into the industrial age. Sure, Studebaker shut its doors in 1963, putting 7,000 people out of

work, but its century-plus run was remarkable for adapting to monumental change.

Today, a group of entrepreneurs and leaders in South Bend is taking aim at a similar and ambitious dream: Transform the Studebaker legacy, an industrial eyesore and symbol of bygone glory for the last 50 years, into a bustling hub for the high-tech data and cloud-computing businesses of the future. They believe the same fundamental components of geography, infrastructure and invention that helped Studebaker put northern Indiana on the global map can lead to another rebirth, dragging the region from the rusted era of manufacturing into the technology age. Fueled in part by Notre Dame's growing research and commercialization efforts, a nascent success story is slowly turning around the Bend.

ARCHIVAL PHOTOS: STUDEBAKER NATIONAL MUSEUM





BARBARA JOHNSTON



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*The building tells a story of South Bend from Studebaker's heyday (far left) to its roll-up-your-sleeves present (top) to the city's vision of a restored future (above).*

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"South Bend has a gift for reinventing itself," says Mayor Pete Buttigieg, a 33-year-old Harvard graduate and Rhodes scholar. "Drawing on Studebaker's historic example, the city's economic comeback reflects the innovative spirit that drove its proud past."

A quick list of recent progress hints at the potential. Data Realty, a data management company, became the first to progress through the pipeline from Notre Dame concept to off-campus incubator to a technology park arising on former Studebaker land. At 140 acres and 4 million square feet of old factory space removed, the Studebaker Corridor is among the largest brownfield remediations in the state, and plans just taking hold could turn it into a significant economic redevelopment project. F Cubed, a DNA diagnostics company, is preparing to move

into one of two buildings under construction there now. The other new building will become home to the Notre Dame Turbomachinery Facility, where research and testing on gas turbine engines is expected to draw companies supporting the aerospace industry.

When it comes to turnarounds, perception is everything. If you start at the airport and drive toward downtown and the failed College Football Hall of Fame, the trip includes dilapidated buildings spotted with liquor and check-cashing stores, closed industrial businesses and boarded-up homes.

But try another route: Start south of Notre Dame with the high-tech incubator at Innovation Park, browse the stores, restaurants and apartments at Eddy Street Commons with its college-town feel, drive by the beautiful new homes in the Triangle and on

Notre Dame Avenue, turn right at the new St. Joseph High School, view the new riverside restaurants and apartment complexes by the East Race, stop downtown for lunch at the rehabbed bank building that Café Navarre calls home, tour the bustling Internet carrier hotel that Union Station has become and end at Ignition Park, where the legacy of Studebaker laid the foundation that tech companies need: cheap space, plentiful power and transportation routes that became the information superhighway.

The difference between these driving paths explains how *Newsweek* could include South Bend on its list of America's Dying Cities in 2010, yet Cisco's Smart + Connected Communities initiative could place South Bend in its 2012 global list of Cities in Transition.



### NOTRE DAME AVENUE



STUDEBAKER NATIONAL MUSEUM

*Studebaker cars were South Bend's glory until the times shuttered the plant in 1963. Now, Building 84, with its bleary-eyed views of downtown, is the last big project remaining.*



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"I had some folks in from Chicago who hadn't been here for a few years," says Rich Carlton, president of Data Realty. The group stayed at the rebuilt Morris Inn and took the second route through town. "These guys were blown away. They couldn't believe the changes they saw."

City-tracked statistics reveal dramatic differences. Private investment in South Bend leaped from \$29 million in 2013 to \$180 million last year. New jobs announced in that period quadrupled from 330 to 1368. Ten years earlier, fewer than 200 new jobs were announced.

Three major factors have sparked the turnaround. Notre Dame's investment in research has recently exploded into a commitment to commercialize — to turn intellectual capital into marketable products, often made nearby. In demographics, the desire of empty-nest Boomers and mobile Millennials to live in cities instead of sprawling suburbs has revived prospects for urban-core redevelopment. Third, the city's location south of the Great Lakes and along a corridor that runs north of the Appalachian Mountains means the region's highways and railroad easements make it one of the densest corridors in the country for transcontinental fiber-optic cables, the backbone of the Internet economy.

Change didn't come from outside factors alone. Past city leaders have paved the way with some hits and misses, but Buttigieg, the first South Bend mayor born after Studebaker closed, is slowly convincing people to simultaneously celebrate the past and let it go.

"Often times, community development is



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an 'overnight' success that's been 30 years in the making," says Scott Ford '01, '09M.Arch., the city's director of community investment. "The same fundamental tenets that made this region attractive to the pioneers are still in place today, especially in terms of transportation and logistics. We have an excellent history of manufacturing, a culture of productivity, plus a tremendous resource in a world-class university at a time when people are rediscovering cities. I think South Bend is poised."

**P**ERHAPS NO SINGLE STORY better exemplifies this small-city tech explosion than that of Kevin Smith '78, whose goal is to turn the last large Studebaker

industrial building into a beehive of high-tech businesses.

The dilapidated, six-story Assembly Building — also called No. 84 or Ivy Tower — and two connected buildings loom just southwest of downtown, a million-square-foot albatross hanging around the city's neck, reminding people of Studebaker's demise. It was never torn down because the city couldn't afford the cost. But Smith saw the building for what it could be. His vision has precedent elsewhere — in River North warehouses in Chicago and in former tobacco plants in Durham, North Carolina, both now booming tech incubators.

"It's what has been holding us down as a community," Smith says. "How fun would it be to take this negative icon and transform





MATT CASHORE '94

*In May, a downtown festival celebrated South Bend's 150 years as a city.*

it into this 21<sup>st</sup> century positive icon, to take a building that once moved us a century forward and see if it can take us another century forward?"

What makes Smith's plans more than idle dreams is his track record. His father, Earl Smith, started Deluxe Sheet Metal in his garage in 1971, bringing in the 15-year-old Kevin to help make gutters and roofing materials.

In 1979, Earl Smith bought the freight area of Union Station for the family business. Two years later, Kevin, who had studied psychology at Notre Dame, purchased the passenger side of the station out of bankruptcy for \$28,000 to house his first tech company, a software developer for the construction industry. The 86-year-old Art Deco structure sits across the railroad tracks from Ivy Tower and across the street from South Bend's minor league baseball stadium. It had once been a major transportation link where three railroads came together, but it was abandoned after passenger train service stopped in the late 1970s. There wasn't even a key for

the unsecured building, which had become a hangout for local gangs.

The younger Smith followed his passion for architecture in restoring the station's Grand Hall. By 1983, it was being used for formal events from proms to wedding receptions. Four years later, Rochester Communications approached Smith about placing equipment in Union Station. The telecom company was using a string of transponders to push microwave signals along the railroad easement, and it needed to boost the signal power. Smith designed and built the space and utilities to fit their needs and learned plenty about the business. His company's ductwork experience helped advance the region's burgeoning tech sector by engineering a patented system to draw off and recycle the excess heat created by high-tech machines.

"I bought Union Station for the family company and because I loved the building," Smith says. "There was some serendipity that it had access to this right-of-way" just as telecom companies were laying lines and,

later, fiber-optic cables along the easements. So Smith developed the abandoned depot into the modern equivalent of a telephone switchboard, where signals are received, intermixed and reconnected. Today Union Station is Indiana's second-largest carrier hotel, a data center whose customers, including Notre Dame, pay for network and server space and interconnection.

By 2001, more than 20 telecom companies held long-term leases in Union Station. Then the dot-com bubble burst. Smith saw an opportunity. He offered to trade his tenants' lease liability for an asset they now undervalued — dark fiber.

When fiber-optic lines are laid, the largest cost is digging the trenches, not the wiring itself, so telecom companies often install hundreds of strands and only "light up" what they need. The rest is dark fiber, and Smith collected miles and miles of it. Two years later, the first of about two dozen enterprise companies moved into the station, looking for a place with cheap



### NOTRE DAME AVENUE

power and fast connections, no longer restricted by location in an economy of remote computing.

Government and economic development leaders in South Bend, Mishawaka and St. Joseph County had earlier formed a nonprofit called Project Future to promote regional planning. They discovered that a lack of linking infrastructure — the costly last mile of connectivity from an organization's building to an Internet trunk line — was holding small cities back. So Project Future, funded by seven large data users, including Notre Dame, created a fiber network — more than 50 miles of it — through public traffic signal conduits. Opened in 2004, the Metronet features unlimited bandwidth, speeds 6,000 times faster than a powerful T-1 Internet connection, and lower prices derived through the competition of carriers housed at its Internet exchange point — Smith's Union Station. The Metronet now has nearly 200 local nonprofit and corporate customers.

"The Metronet gave you an opportunity to pick your [telecom] services," says

Pat McMahon '72, '75M.S., who led Project Future for 30 years before becoming Notre Dame's director of technology commercialization in 2012. "By addressing this, we leveled the playing field with any big city, allowing this area to be price-competitive for any data-centric business. That's a big deal."

Another big deal: Smith's business had been growing at 40 percent a year. Union Station was nearly full in 2011 when his gaze strayed across the tracks to Ivy Tower, Studebaker's old assembly building.

**B**ACK WHEN STUDEBAKER employed as many as 26,000 people, the Assembly Building could pump out a car body every 12 seconds. The firm stopped making wagons in the 1920s and moved its car-making operations from Detroit to South Bend. The Assembly Building, erected in 1923 from concrete thick as a bomb bunker, took in materials from train cars unloaded on the first floor. Automobile bodies were assembled on conveyer belts

and elevators zig-zagging up through the building, ending with upholstery installation on the sixth floor. Huge windows admitted natural light to cavernous spaces interrupted only by sturdy pillars. It was in this period that Studebaker hired Knute Rockne, Class of 1914, as a spokesman and motivational speaker.

By 1950, nearing its 100-year anniversary, the company churned out a high of 400,000 cars and trucks yearly. It finally folded in 1963, mainly because Detroit companies had the scale to sell at a discount and absorb losses.

What Smith found in the Assembly Building nearly 50 years later was a solid shell in disrepair. Ivy Tower had become a rusting warehouse for car bodies, boats and piles of junk ranging from thousands of 1,800-pound diesel engines to boxes of that ancient computer paper with the edge-feeder holes. The building needed hundreds of new windows, environmental remediation and a major makeover. Smith made the city a proposition: Rather than spend up to \$10 million

*The blizzard of '78 crumpled No. 84's neighbor building. Smith envisions a glass-covered courtyard in its place.*



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to tear it down, use that money instead to renovate it. He promised to invest at least an equal amount to create more space for companies like those in Union Station.

"I said, 'Let's take the Studebaker foundation and not discard it but repurpose it,'" Smith related during a 2013 tour of his newly acquired building. "I can bring the core of the new economy and plant it and let it grow in this big building. How often are you given an opportunity — and a responsibility — to give your community another chance?"

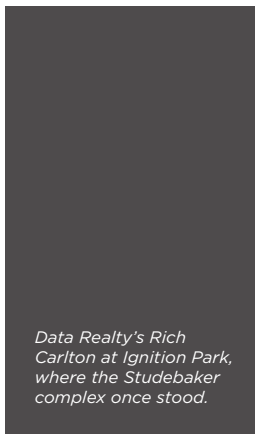
Acquiring the building had taken longer than expected. The city finally announced the deal on Dec. 20, 2013, on the 50<sup>th</sup> anniversary of the shutdown of the assembly line. Twenty spotlights shining into the sky around the city highlighted innovative success stories developed since Studebaker closed, with the last spotlight illuminating Ivy Tower. Smith unveiled ambitious plans that include data centers, enterprise business space, first-floor retail, a glass-topped courtyard, top-floor condos with green-roof patios overlooking the minor league baseball field, and an innovation center that would retrain workers for the new economy. He promised space to the Studebaker Drivers Club and a group of civic-improvement entrepreneurs, recently graduated from Notre Dame, called enFocus (see related story, page 13).

The design renderings for the Assembly building and its two smaller neighbors that Smith now calls the Renaissance District are inspirational. They may also be unrealistic. Some question whether enough tech companies will want to pay for space half a mile from downtown in an old building between the county jail and noisy train tracks. More to the point, will they pay enough to make the expensive retrofit profitable?

Smith believes his success at Union Station shows they will. He plans to again harness heat from the computer servers to reduce utility costs, and he has committed to move Deluxe Sheet Metal and his other businesses in as anchor tenants.

"You have to be a patient visionary in a place like South Bend," he says. "This could take 10 to 20 years to unfold. But I'm already getting approached by people who need lots of space, so who knows?"

Remediation work has plodded along, but asbestos and PCB removal were completed in 2014, and lead paint was nearly all stripped by March. Smith expects to have tenants by Christmas. At the very least, he says, the 10 companies he owns could use nearly half the space, about 400,000 square



*Data Realty's Rich Carlton at Ignition Park, where the Studebaker complex once stood.*



feet, within five years. That would help settle those who worry the project could fail and become a black eye on the city's comeback story. Many are taking a wait-and-see approach, but city officials say turning a fallen cultural landmark back into an economically viable space will help the community in the long run. "Given the scale of the space, it's a longer-term expectation," Scott Ford says.

**P**LANS FOR THE REST of the former Studebaker campus south of Ivy Tower are moving forward rapidly. The rebirth began across town in 2007, when Notre Dame announced the creation of Innovation Park, a business incubator to transform University innovation into market-ready ventures. That building opened just across Edison Road from campus two years later, filled rapidly and now nurtures dozens of startups ranging from the makers of superbug antibiotics and nanotech powders to 3D printing innovations and a virtual fitting room. A year after Innovation Park opened, South Bend launched its sister, Ignition Park, on the Studebaker land with the hope of enticing spinoffs from Notre Dame's growing commercialization enterprise.

Using a combination of local, state and federal resources, the city spent about \$30 million to acquire the land, demolish most of the buildings and clean up what they couldn't destroy, plus another \$2.5 million for new roads and utility infrastructure. Some taxpayer advocates objected, but city officials plowed ahead. Their faith began to pay off in 2011. Data Realty, the data storage firm started in Innovation Park, built a \$15-million facility in Ignition Park

and recently announced plans for an expansion. Notre Dame is both an investor and a customer.

"With improved connectivity, more things are going to cloud-based applications and businesses can be located anywhere," says Carlton, Data Realty's president. "I look at the next five years at Ignition Park, and I think we're going to be surrounded by thriving technology companies and thought leadership that will impact the communities of South Bend and Notre Dame in some significant ways."

Call Brad Toothaker another believer investing in that vision. The commercial developer and managing partner of Great Lakes Capital is building the two Ignition Park buildings that will house Notre Dame's turbine testing facility and other high-tech companies. Toothaker began without committed tenants but now has agreements with startups like F Cubed and plans to open the buildings this summer. Future plans call for eight buildings and half-a-million square feet of research and development space with common areas where creative types can mingle and generate ideas. The company also renovated two prominent downtown buildings that are now home to its own offices, Café Navarre and the software startup Vennli, launched by Gary Gigot '72, the benefactor behind Notre Dame's Gigot Center for Entrepreneurship.

Toothaker sees the range of projects stretching from Eddy Street Commons to Ignition Park as more complementary than competitive, building momentum when they succeed financially. He thinks the city is rising "like a phoenix" from the Studebaker ashes.

PHOTO BY BARBARA JOHNSTON



### NOTRE DAME AVENUE



*Developer Brad Toothaker, making bricks out of South Bend's 'ashes.'*

"A vibrant urban core is the biggest barometer of how you see a community," he says. "You have to create a certain magnitude. And Ignition Park is turning out to be what was intended — the next stage of life for research coming out of the University. It's happening quicker than I thought."

Truthfully, Notre Dame got into research parks late in the game. Stanford University's parks helped spawn Silicon Valley, and Purdue University now has four parks across Indiana that house 200 companies. But ND has recently increased its commitment, investing heavily in the Office of Research since appointing Robert Bernhard as a new vice president in 2007.

"Like Purdue in West Lafayette, we can create an ecosystem of entrepreneurs here, with some having the potential to grow into major operations," Bernhard says.

Notre Dame research funding increased from \$73 million in fiscal 2005 to \$182 million in fiscal 2014, according to data from the Association of University Technology Managers. Today more people and protocols on campus are available to help researchers at every step: to apply for grants and patents, develop an idea and launch a business at Innovation Park; to find investors through

a group called Irish Angels; and to grow a company to maturity at Ignition Park.

Buttigieg says a city boasting a world-class research university is "more valuable than an oil well for making it in the knowledge economy that's on the rise." As leaner companies and tax-wary governments made cutbacks, universities have increasingly filled the void in research and development. "Commercialization" used to be a bad word around here," says David Brenner '73, the executive director of Innovation Park. "But recently, we've come to see it as a way to fulfill our mission to be a source of good, to bring our research to the world."

It was that kind of institutional support that convinced Gary Gigot to move his family and start a marketing software company in South Bend rather than Seattle, where he'd built a successful career at tech powerhouses such as Visio and Microsoft. He founded Vennli in 2013 with Joe Urbany, a marketing professor in the Mendoza College of Business. He says he found in South Bend everything the business needed: top-quality lawyers and accountants, capital from several sources, talented local employees and professional expertise.

"At 64, you don't start a software company

and move across the country if you don't have belief in the potential," Gigot says. "I think South Bend can go far down the path of transforming itself, but it takes companies that are successful to get the flywheel turning. Then you need a whole ecosystem of companies to fill in the gaps, not just one that can move away."

**A** LOOK AT SOUTH BEND'S history reveals a sometimes forgotten record of economic greatness. In the late 1800s, cheap power from a dam on the St. Joseph River and mills on the East Race helped sustain 140 factories and the country's largest companies in three key industries — transportation, farming and clothing. Besides Studebaker's wagons and buggies, which were used by U.S. presidents and militaries across the world, the inventor James Oliver created an improved plow design with hardened steel to cut through the difficult Great Plains dirt. Oliver Plow converted to mechanized farm equipment before being absorbed in a series of mergers after 1933. Meanwhile, the Singer Sewing Machine Co. produced cabinets at a South Bend plant that employed 3,000 people when the company

PHOTOS BY BARBARA JOHNSTON



captured three-fourths of the world market in 1914. Post-war production dwindled after consumer tastes shifted to store-bought clothes.

South Bend's industrial golden age carried it through the tough times of the Depression. Vincent Bendix, a groundbreaker in the auto and aviation industries, started a company in 1924 that employed more workers in the area than Studebaker. A college education wasn't needed for a good job. Manufacturing grew to more than half the city's employment, so the slow ebb at Bendix and the sudden stop at Studebaker hit hard by the 1970s.

It's often reported that South Bend lost a third of its population in the following decades, but local historians tell a different story. Many people moved to Granger at a time of suburban flight, staying in the county but putting distance between their families and the city's problems, and unemployment actually stabilized within two years of Studebaker's closure. The worst sting from Studebaker's demise was psychological.

Mayor Buttigieg says a part of his job is to convince people that a company like Studebaker is not coming back — and that's fine. "Frankly, I'd rather have people working 200 at a time at a hundred companies, so that if some come and go, we can absorb that," he says. "I think South Bend is getting its groove back. You can just feel that people believe in the city again, and that's contagious."

Major challenges loom as the city celebrates its 150<sup>th</sup> anniversary this year, but Buttigieg says the city's defining quality has been "taking what we have and fashioning it into something new." Ignition Park and Ivy Tower are part of a tradition, he says, that includes the East Race. Filled with debris for years, the waterway that once powered South Bend factories was transformed into North America's first urban man-made kayak course in the 1980s. The East Race now draws thousands of tourists a year.

Buttigieg often carries an antique pocket watch to make his point. He explains that the 1909 beauty was made by South Bend Watch and features the city's name on its face "because the name South Bend was a byword for workmanship and excellence" — a brand powerful enough to sell products. The company folded by 1930 because "they persisted in making the best pocket watches of the early wristwatch era." They didn't adapt. But they didn't need to start making iPods, he says. They just needed to evolve with what they had. "That's innovation, South Bend style." □



IN THE SPRING OF 2012, Professor David Murphy took a few dozen aspiring entrepreneurs on a tour of South Bend's Union Station, which houses computer servers and a range of high-tech businesses.

A few weeks later, the same group of Notre Dame graduate students in Murphy's Engineering, Science and Technology Entrepreneurship Excellence Master's program (ESTEEM), took a spring break trip to North Carolina's Research Triangle. In Durham, they marveled at a buzzing startup incubator called America Underground, located in a former Lucky Strike cigarette factory that had been transformed into a mixed-use development of restaurants, entertainment venues, housing and green space.

Seeing budding potential and bustling product in quick succession inspired the students to ask whether they could help South Bend emulate Durham's transformation. That idea snowballed into enFocus, a nonprofit talent incubator that offers ESTEEM graduates a one-year fellowship working with clients, from the city and its public transportation system to schools and hospitals. Kevin Smith '78, the owner of Union Station, donated office space in his building and the services of a consulting manager. Mike Bieganski, a former Bosch executive, offered office equipment. And local developer David Matthews created a loft-style community apartment for the fellows at his Emporium complex on the St. Joseph River.

Each enFocus fellow leads a project, with a local business leader as a mentor. The community in turn reaps the benefit of talented and motivated consultants at an exceptionally low price.

In the first year alone, enFocus' seven consultants were able to identify \$3.2 million in unrealized savings opportunities within public funds. These ranged from an optimization of the city's solid waste fleet that could save up to \$500,000 to an analysis that helped the Notre Dame Federal Credit Union receive a beneficial designation for serving a low-income community. The enFocus program was so successful that in 2013 it won a \$3 million grant from the Eli Lilly Foundation to help it grow and replicate throughout Indiana over the next five years. Turning the area's brain drain into brain gain, the program's retention rate over two years has been 75 percent, with some fellows turning down jobs at tech giants on both coasts to stay in South Bend. Some hope to open new businesses, one has become the program's executive director and another has become the city's chief innovation officer.

Expansion plans call for the program to relocate from Union Station to Studebaker Building 113, a two-story structure in Smith's "Renaissance District" that will be renovated before the much larger former auto assembly factory to which it's attached.

— Brendan O'Shaughnessy '93

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