



The city with a heart

APPLICATION FOR DESIGNATION AS AN ECONOMIC REVITALIZATION AREA

This application is to be completed and signed by the owner of the property where property redevelopment or rehabilitation and/or the installation of new manufacturing equipment and/or new research and development equipment are to occur. The Elkhart City Common Council ("Council") will review this application to determine whether a particular area should be designated as an Economic Revitalization Area in accordance I.C. 6-1.1-12.1 and all subsequent amendments made thereafter. The Council makes no representation as to the effect of a designation granted by it for purposes of any further applications or approvals required under I.C. 6-1.1-12.1, and makes no representation to any applicant concerning the validity of any benefit conferred, also under I.C. 6-1.1-12.1.

APPLICATION IS FOR: (check either or both)

Real Estate Improvement (New Building, Addition, and/or Modification)

New Equipment (Manufacturing and/or Research and Development)

There is a non-refundable filing fee of \$500 for either of the categories above or \$750 for both. The filing fee will be used to defray the costs incurred by the City of Elkhart in processing the application pursuant to I.C. 6-1.1-12.1-2(h). Please make the check payable to the City of Elkhart and include it with the application.

CONTACT INFORMATION

1. Company Name _____
 2. Contact Person/Representative: _____
 3. Mailing Address of Contact Person: _____

 4. Telephone Number: _____ Fax Number: _____
 5. E-mail Address: _____
-

COMPANY BACKGROUND INFORMATION

6. Description of the company ' s product or process:_____

7. What year was the company founded?_____

8. Dollar amount of annual sales for each of the last three years:_____

9. List three largest customers, their locations and amount of annual sales:

Customer	City/State	Annual Gross Sales
_____	_____	_____
_____	_____	_____
_____	_____	_____

10. List three largest material suppliers, their locations and amount of annual purchases:

Customer	City/State	Annual Gross Sales
_____	_____	_____
_____	_____	_____
_____	_____	_____

PROPERTY INFORMATION

11. Property owner(s):_____

12. Address of property:_____

13. Township_____ 14. Key numbers_____

15. Legal description of property (attach written description if not in platted subdivision):

16. Current use of the property

a. How is the real estate presently used?_____

b. What structures are on the property? _____

c. What is (are) the general condition of structure(s)? _____

17. Current assessed value of the real estate

a. Land: _____ b. Improvements _____

18. Total property taxes owed during the immediate past year: _____

19. Current zoning designation: _____

20. State Law (I.C. 6-1.1-12.1-1) requires that the designating body make specific findings to justify the designation of the property as an Economic Revitalization Area. One finding is that the subject property is either in an area:

“Which has become undesirable for, or impossible of, normal development and occupancy because of age, lack of development, cessation of growth, deterioration of improvements or character of occupancy, age, obsolescence, substandard buildings, or other factor which have impaired values or prevent a normal development of property or use of property” or

“Where a facility or a group of facilities that are technologically, economically, or energy obsolete is located and where the obsolescence may lead to a decline in employment and tax revenues” .

Please provide evidence that the subject property is located in such an area. (attach additional sheets if necessary)

PROJECT INFORMATION

21. Description of proposed improvements

- a. Structures: _____

- b. Manufacturing equipment: _____

- c. Research & development equipment: _____

22. Cost of proposed improvements (not including land costs)

- a. Structural improvements: _____
- b. New manufacturing equipment: _____
- c. New research & development equipment: _____
- d. New equipment included above that is classified as special tooling (as defined by Regulation No. 16 and reported on Form 103-T): _____

23. Development time frame

- a. When will construction of the structure and/or installation of new equipment begin?

- b. When is completion of the project expected? _____

24. Will this project require approval of rezoning, plat, development plan, vacation, variance, special exception, or contingent use prior to the issuance of an Improvement Location Permit? _____ If yes, list: _____

JOB CREATION & RETENTION

25. Current full-time employment

	<i>Number Of Jobs</i>	<i>Average Salary</i>	<i>Salary Range</i>
Management	_____	_____	_____
Supervision	_____	_____	_____
Sales	_____	_____	_____
Clerical	_____	_____	_____
Production	_____	_____	_____
Maintenance	_____	_____	_____
_____	_____	_____	_____

26. Full-time jobs to be created as a result of this project

	<i>Number Of Jobs</i>	<i>Average Salary</i>	<i>Salary Range</i>
Management	_____	_____	_____
Supervision	_____	_____	_____
Sales	_____	_____	_____
Clerical	_____	_____	_____
Production	_____	_____	_____
Maintenance	_____	_____	_____
_____	_____	_____	_____

27. Anticipated date for reaching employment level in Question 26: (must be within three years) _____

28. Check all of the benefits listed below that the company provides to workers who have been employed for 6 months. The company must pay at least 70% of the benefit cost.

_____ Paid Vacation _____ Health Insurance _____ Uniforms

_____ Sick Leave	_____ Life Insurance	_____ Employee Training
_____ Paid Holidays	_____ Dental Insurance	_____ Tuition Reimbursement
_____ 401k/Pension	_____ Vision Insurance	_____ ESOP/Profit Sharing
_____ Other (Please List): _____		

COMMUNITY BENEFITS

29. How will the proposed designation further the economic development objectives of the City of Elkhart? (Please answer Yes or No, and provide an explanation).

a. Will the designation improve the utilization of vacant or under utilized land?

b. Will the designation encourage the redevelopment of a brownfield? A brownfield is defined as, "an industrial or commercial property that is abandoned, inactive or underutilized, on which expansion or redevelopment is complicated due to actual or perceived environmental contamination" .

c. Will the designation assist in the inducement of a project providing substantial employment opportunities, particularly those that pay above the County average?

d. Will the designation assist in the inducement of a project which would provide long-term benefits to the tax base of the City of Elkhart warranting the granting of the annually decreasing percentage of property tax abatement as provided in I.C. 6-1.1-12.1?

e. Is the proposed project located in the Urban Enterprise Zone? (see enclosed map) Yes _____ No _____

30. The City of Elkhart has established the Tax Abatement Development Fund as a means to fund projects that promote economic growth. The fund is being capitalized with voluntary tax deductible contributions of a portion of the tax savings realized by companies receiving a tax phase-in. Per Indiana Code 6-1.1-12.1-14, the local designating body may impose a fee with the consent of the property owner not to exceed 15% of the tax savings realized by companies receiving a tax phase-in. Applications that include contributions to the Tax Abatement Development Fund may be eligible for longer terms of abatement.

Is the company willing to contribute a portion of its tax savings? (Please check one)

Yes: _____ 15% No: _____

Filing this application constitutes a request for Economic Revitalization Area designation only and does not constitute an automatic deduction of property taxes. I understand it is the responsibility of the property owner to file the appropriate abatement forms with the Elkhart County Auditor if the designation is approved. I hereby certify the information and representations of this application are true and complete.

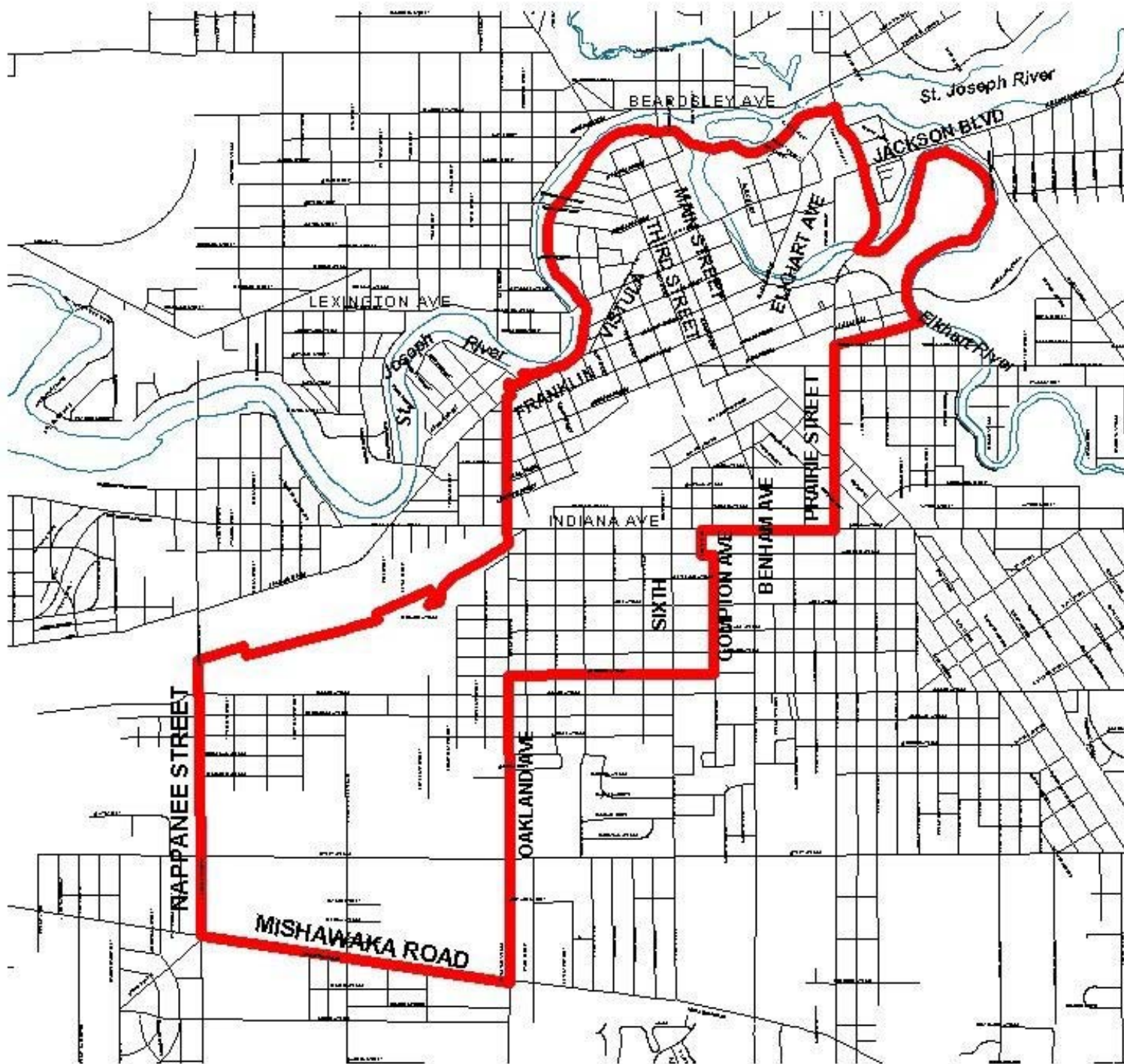
Signature of owner or authorized representative Date

This application will not be considered complete unless the items listed below are attached. Once the application is determined to be complete, then this project will be placed on the agenda of the appropriate designating body.

- _____ 1.) Application Fee (Make check payable to "City of Elkhart")
- _____ 2.) Statement of Benefits (SB-1/RE and/or SB-1/PP) Form(s) (attached)

_____ 3.) Legal Description of Property (if applicable)

Elkhart Urban Enterprise Zone





STATEMENT OF BENEFITS PERSONAL PROPERTY

State Form 51764 (5-04)

Prescribed by the Department of Local Government Finance

**FORM
SB - 1 / PP**

INSTRUCTIONS:

1. This statement must be submitted to the body designating the economic revitalization area prior to the public hearing if the designating body requires information from the applicant in making its decision about whether to designate an Economic Revitalization Area. Otherwise this statement must be submitted to the designating body **BEFORE** a person installs the new manufacturing equipment and/or research and development equipment, and/or logistical distribution equipment and/or information technology equipment for which the person wishes to claim a deduction. "Projects" planned or committed to after July 1, 1987 and areas designated after July 1, 1987 require a STATEMENT OF BENEFITS. (IC 6-1.1-12.1)
2. Approval of the designating body (City Council, Town Board, County Council, etc.) must be obtained prior to installation of the new manufacturing equipment and/or research and development equipment and/or logistical distribution equipment and/or information technology equipment, **BEFORE** a deduction may be approved
3. To obtain a deduction, Form 322 ERA/PPME and/or Form 322 ERA/PP Other, must be filed with the county auditor. Form 322 ERA/PPME and/or Form 322 ERA/PP Other must be filed between March 1 and May 15 of the assessment year in which new manufacturing equipment and/or research and development equipment and/or logistical distribution equipment and/or information technology equipment becomes assessable, unless a filing extension has been obtained. A person who obtains a filing extension must file the form between March 1 and the extended due date of that year.
4. Property owners whose Statement of Benefits was approved after June 30, 1991 must submit Form CF-1 annually to show compliance with the Statement of Benefits. (IC 6-1.1-12.1-5.6)
5. The schedules established under IC 6-1.1-12.1-4(d) and IC 6-1.1-12.1-4.5(e) effective July 1, 2000 apply to any statement of benefits filed on or after July 1, 2000. The schedules effective prior to July 1, 2000 shall continue to apply to those statement of benefits filed before July 1, 2000.

SECTION 1 TAXPAYER INFORMATION													
Name of taxpayer													
Address of taxpayer (street and number, city, state and ZIP code)													
Name of contact person							Telephone number						
SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT													
Name of designating body							Resolution number						
Location of property					County		Taxing district						
Description of manufacturing equipment and/or research and development equipment and/or logistical distribution equipment and/or information technology equipment (use additional sheets if necessary)					ESTIMATED								
										Start Date		Completion Date	
					Manufacturing Equipment								
					R & D Equipment								
					Logist Dist Equipment *								
IT Equipment *													
SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT													
Current number		Salaries		Number retained		Salaries		Number additional		Salaries			
SECTION 4 ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT													
NOTE: Pursuant to IC 6-1.1-12.1-5.1 (d) (2) the COST of the property is confidential.			Manufacturing Equipment		R & D Equipment		Logist Dist Equipment *		IT Equipment *				
			Cost	Assessed Value	Cost	Assessed Value	Cost	Assessed Value	Cost	Assessed Value			
Current values													
Plus estimated values of proposed project													
Less values of any property being replaced													
Net estimated values upon completion of project													
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER													
Estimated solid waste converted (pounds) _____					Estimated hazardous waste converted (pounds) _____								
Other benefits:													
SECTION 6 TAXPAYER CERTIFICATION													
I hereby certify that the representations in this statement are true.													
Signature of authorized representative					Title			Date signed (month, day, year)					

* See IC 6-1.1-12.1-2.3.

FOR USE OF THE DESIGNATING BODY

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

A. The designated area has been limited to a period of time not to exceed _____ calendar years * (*see below*). The date this designation expires is _____.

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

- | | | |
|--|------------------------------|-----------------------------|
| 1. Installation of new manufacturing equipment; | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2. Installation of new research and development equipment; | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3. Installation of new logistical distribution equipment. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 4. Installation of new information technology equipment; | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

C. The amount of deduction applicable to new manufacturing equipment is limited to \$ _____ cost with an assessed value of \$ _____.

D. The amount of deduction applicable to new research and development equipment is limited to \$ _____ cost with an assessed value of \$ _____.

E. The amount of deduction applicable to new logistical distribution equipment is limited to \$ _____ cost with an assessed value of \$ _____.

F. The amount of deduction applicable to new information technology equipment is limited to \$ _____ cost with an assessed value of \$ _____.

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

H. The deduction for new manufacturing equipment and/or new research and development equipment and/or new logistical distribution equipment and/or new information technology equipment installed and first claimed eligible for deduction after July 1, 2000 is allowed for:

- | | |
|-------------------------------------|--------------------------------------|
| <input type="checkbox"/> 1 year | <input type="checkbox"/> 6 years |
| <input type="checkbox"/> 2 years | <input type="checkbox"/> 7 years |
| <input type="checkbox"/> 3 years | <input type="checkbox"/> 8 years |
| <input type="checkbox"/> 4 years | <input type="checkbox"/> 9 years |
| <input type="checkbox"/> 5 years ** | <input type="checkbox"/> 10 years ** |

** For ERA's established prior to July 1, 2000 only a 5 or 10 year schedule may be deducted.

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

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

* If the designating body limits the time period during which an area is an economic revitalization area, it does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years designated under IC 6-1.1-12.1-4.5



**STATEMENT OF BENEFITS
REAL ESTATE IMPROVEMENTS**

State Form 51767 (5-04)

Prescribed by the Department of Local Government Finance

**FORM
SB - 1 / RE**

INSTRUCTIONS:

1. This statement must be submitted to the body designating the economic revitalization area prior to the public hearing if the designating body requires information from the applicant in making its decision about whether to designate an Economic Revitalization Area. Otherwise this statement must be submitted to the designating body **BEFORE** the redevelopment or rehabilitation of real property for which the person wishes to claim a deduction. "Projects" planned or committed to after July 1, 1987 and areas designated after July 1, 1987 require a STATEMENT OF BENEFITS. (IC 6-1.1-12.1)
2. Approval of the designating body (City Council, Town Board, County Council, etc.) must be obtained prior to initiation of the redevelopment or rehabilitation, **BEFORE** a deduction may be approved.
3. To obtain a deduction, Form 322 ERA, Application for Deduction from Assessed Valuation of Structures in Economic Revitalization Areas, must be filed with the county auditor by the later of: (1) May 10; or (2) thirty (30) days after the notice of addition to assessed valuation or new assessment is mailed to the property owner at the address shown on the records of the township assessor.
4. Property owners whose Statement of Benefits was approved after June 30, 1991 must submit Form CF - 1 annually to show compliance with the Statement of Benefits. (IC 6-1.1-12.1-5.6)
5. The schedules established under IC 6-1.1-12.1-4(d) and IC 6-1.1-12.1-4.5(e) effective July 1, 2000 apply to any statement of benefits filed on or after July 1, 2000. The schedules effective prior to July 1, 2000 shall continue to apply to those statement of benefits filed before July 1, 2000.

SECTION 1 TAXPAYER INFORMATION					
Name of taxpayer					
Address of taxpayer (street and number, city, state and ZIP code)					
Name of contact person				Telephone number	
SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT					
Name of designating body				Resolution number	
Location of property			County	Taxing district	
Description of real property improvements (use additional sheets if necessary)				ESTIMATED	
				Start Date	
				Real Estate	
SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT					
Current number	Salaries	Number retained	Salaries	Number additional	Salaries
SECTION 4 ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT					
NOTE: Pursuant to IC 6-1.1-12.1-5.1 (d) (2) the COST of the property is confidential.		Real Estate Improvements			
		Cost		Assessed Value	
Current values					
Plus estimated values of proposed project					
Less values of any property being replaced					
Net estimated values upon completion of project					
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER					
Estimated solid waste converted (pounds) _____		Estimated hazardous waste converted (pounds) _____			
Other benefits:					

SECTION 6 TAXPAYER CERTIFICATION		
I hereby certify that the representations in this statement are true.		
Signature of authorized representative	Title	Date signed (month, day, year)

Tax Phase-in Application and Approval Process

1. Please complete this application, along with the attached Statement of Benefits (SB-1). Be sure to indicate if the application is for real property, personal property, or both. Sign both the application and applicable SB-1, along with a *check made payable to the City of Elkhart and return to:

City of Elkhart
Attn: Economic Development Manager
Department of Planning & Development
Elkhart, IN 46516

**The application fee is \$500.00 for either real or personal property, or \$750.00 for both.*

2. Once a completed application is received, staff will review the application and score the information contained within in order to determine if the project qualifies for a tax phase-in and if so, for what period of time (deduction can be for 3, 5, 7 or 10 years).
3. If the project qualifies for a tax phase-in, staff will prepare all necessary documentation that will be presented to the City Council. City Council approval is a two step process that will at two separate council meetings. At the first meeting, the Council will vote to either approve or deny the Declaratory Resolution. If approved, the Council will vote to either approve or deny the Confirming Resolution.
4. If both the Declaratory and Confirming Resolutions are approved, the applicant will then be required to sign a Memorandum of Agreement. This is a contract between the City and applicant which clearly documents the commitment each entity is making related to the project. This document must be signed by a company representative and approved by the City Council.
5. Once the project is complete, the applicant must file the ERA 322 form with the County Assessor. This form should be submitted with your tax bill in order to begin claiming the tax deduction.
6. Companies must file a Compliance with Statement of Benefits (CF-1) form to the Elkhart City Council for each year the tax deduction is claimed. This must be submitted between March 1 and May 15. The Council will review each CF-1 and determine if the company is in compliance with their Statement of Benefits that was submitted with their original tax phase-in application. If the Council determined that a company is in substantial compliance, the tax phase-in continues as scheduled. If the company is determined to be non-complaint, the Council may take the appropriate steps to terminate the tax phase-in.

FOR USE OF THE DESIGNATING BODY

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

A. The designated area has been limited to a period of time not to exceed _____ calendar years * (*see below*). The date this designation expires is _____.

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

- | | |
|---|--|
| 1. Redevelopment or rehabilitation of real estate improvements; | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 2. Residentially distressed areas | <input type="checkbox"/> Yes <input type="checkbox"/> No |

C. The amount of deduction applicable for redevelopment or rehabilitation is limited to \$ _____ cost with an assessed value of \$ _____.

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

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

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

* If the designating body limits the time period during which an area is an economic revitalization area, it does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years designated under IC 6-1.1-12.1-4.



Tax Phase-In Submission Checklist

To ensure that your application is submitted and processed most efficiently, we ask that you use this checklist before you submit your application.

- Application type has been selected appropriately at the top of the application page (Real Property and/or Personal Property. Please **do not select both if you are only submitting one SB-1**)
- Every question** has been answered
 - **The more detailed you are, the faster the city can process your application.**
- All forms are signed and dated with **clear dark signatures**
- Both **front and backs of forms** have been scanned
 - Check your page numbers and make sure all pages have been scanned and uploaded for sending.
- Application is ready to be sent in **PDF format**
- If filing a Real Property Tax Phase-In, **Property Deed is attached.** (This contains the necessary legal description)