

FEB 08 2024

Neice, Jessica

CITY CLERK

From: Sakbun, Brandon
Sent: Wednesday, February 7, 2024 10:00 AM
To: Nation, Todd
Cc: Nation, Todd; Loudermilk, Cheryl; Chalos, James; Hinton, Kandace; Dinkel, Anthony; Thompson, Amanda; DeBaun, Curtis; Azar, George; Boland, Tammy; Jordan Marvel; Tohill, Jesse; Edwards, Michelle; Thome, Jessica; Ingram, LaDonna; Rachel Leslie
Subject: RE: EXTERNAL -Re: ARPA Presentation PDF
Attachments: City TH Small Business Grant Program.pdf; City TH NFP Grant Program.pdf; Radio Information.pdf

Sounds good. I should have a meeting date and time soon. The presentation is also available on the city's website <https://www.terrehaute.in.gov/mayors-office/arpa>.

Former ARPA Projects Update:

THRIVE- We received 8 applications for the 3rd round of grants. Those were due on Jan 12th and will be announced soon. All ARPA dollars allocated by the city and county will go to projects in the city and county. We have adjusted our grant program to open up access to more builders. There are now 4 programs. These can be found at <https://thrivewestcentral.com/housing/>. I have a Thrive Housing Steering Committee Meeting next week on the 12th. From a Redevelopment standpoint, Dean has been working to transfer vacant lots to builders. We have an arduous process where we analyze a builders past performances and financial abilities. These 20 lots are apart of our infill housing strategy and nest with the THRIVE Homes for the Future Program.

United Way Small Business and nonprofit Funds- The 2.25 million previously allocated will be available for community businesses and nonprofits. I have attached the programs to this email. I have a meeting Friday today to discuss the marketing of these programs and the decision criteria for projects.

City Radios- I have the quote (730K) to get the city to standard for radios across all departments. That PDF is also attached.

I will publicly update the council and the community on these three bullets at Thursday's city council meeting.

Best,

Brandon Sakbun

Mayor

City of Terre Haute

17 Harding Avenue, IN, 47807

Office: (812) 244-2303 | Cell: (812) 243-8957

City Hall 1st Floor



From: Todd Nation <booknation@gmail.com>

Sent: Wednesday, February 7, 2024 9:01 AM

To: Sakbun,Brandon <Brandon.Sakbun@TerreHaute.IN.Gov>

Cc: Nation,Todd <Todd.Nation@TerreHaute.IN.Gov>; Loudermilk,Cheryl <Cheryl.Loudermilk@TerreHaute.IN.Gov>; Chalos,James <James.Chalos@TerreHaute.IN.Gov>; Hinton,Kandace <Kandace.Hinton@TerreHaute.IN.Gov>; Dinkel,Anthony <Anthony.Dinkel@TerreHaute.IN.Gov>; Thompson,Amanda <Amanda.Thompson@TerreHaute.IN.Gov>; DeBaun,Curtis <Curtis.DeBaun@TerreHaute.IN.Gov>; Azar, George <George.Azar@TerreHaute.IN.Gov>; Boland,Tammy <Tammy.Boland@TerreHaute.IN.Gov>; Jordan Marvel <jmarvel@rjlsolutions.com>; Tohill,Jesse <Jesse.Tohill2@TerreHaute.IN.Gov>; Edwards,Michelle <Michelle.Edwards@TerreHaute.IN.Gov>; Thome,Jessica <Jessica.Thome@TerreHaute.IN.Gov>; Ingram,LaDonna <LaDonna.Ingram@TerreHaute.IN.Gov>; Rachel Leslie <rleslie@rjlsolutions.com>

Subject: EXTERNAL -Re: ARPA Presentation PDF

****External Email. - Think Before You Click**** --
Help Desk

Hi Mayor Sakbun,

Thanks for sending this ARPA presentation. There's a lot of info in here, and I appreciate the chance to review it.

On meeting with the water company: please include me as you schedule a group session. As we have discussed, I'm interested in understanding the bigger picture — how many households are still on well water, where they are, and what giving them all a chance to hook up to "city water" will take.

See you soon,

Todd

.....

On Feb 2, 2024, at 7:45 AM, Sakbun,Brandon <brandon.sakbun@terrehaute.in.gov> wrote:

City Council,

I have attached the ARPA Presentation. I will have the website updated today with the presentation and the ARPA section under the Mayor's Office tab. Please please please schedule time with LaDonna for us to sit down and discuss these projects. Todda has already sent me a great list of his questions for the downtown hotel project. I will work on that list today.

Indiana American Water- if multiple council members want to huddle on this project let me know. I can schedule a meeting with IAW's leadership and design team to discuss this in depth.

READI 2.0 Update- Yesterday multiple READI projects were submitted for our region. I signed 8 letters of support for projects involving childcare, workforce development, parks, higher education, the arts, and quality of life enhancements. I do not want to list these out as it is best to wait until awards are announced prior to publicly disclosing the projects I supported. Feel free to call me and discuss those initiatives as well.

Here to serve,

Brandon Sakbun
Mayor of Terre Haute
Terre Haute, Indiana
(P) 812.243.8957
brandon.sakbun@terrehaute.in.gov

<image001.png>

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The City of Terre Haute 17 Harding Avenue Terre Haute, IN 47807

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City of Terre Haute Small Business Retention/Expansion Grant Program

Funding

\$1,500,000

Purpose

The goal of this grant program is to provide financial support for small businesses in the City of Terre Haute to respond to the negative impacts of the COVID-19 pandemic and to increase the economic health of the area. Understanding many small businesses and nonprofits are still healing economically from the pandemic, or growth was stalled due to the pandemic, the city and county want to positively impact their ability to stabilize and ultimately grow. The program also focuses on multiple pillars of the See You In Terre Haute Community Plan, including economic development, quality of life, and talent attraction and retention. These grants are intended to help small businesses grow, support business recovery, and increase the overall resiliency of local businesses in the City of Terre Haute.

Goals

Retain existing businesses
Retain existing employees
Increase revenue
Increase employees

Eligibility of Applicants

- Business based in the city of Terre Haute limits
- 75 or fewer full-time employees
- Locally owned and operated - this includes franchised businesses
- Business cannot be a subsidiary of a larger corporation
- Publicly traded companies are not eligible
- Must have been in operation in the city of Terre Haute since March 2020 and must still be in operation.
- Business must be able to describe a negative impact on their business created by the COVID-19 pandemic to qualify for funding.
- Applicant business must be registered and in good standing with Indiana Secretary of State as a Business Entity, or if a sole proprietorship have a certificate of assumed business name or doing-business- as (DBA) form record from the County Recorder.
- Must disclose information on any pending litigation or legal actions
- Preference will be given to those who did not receive previous COVID-19 funding like PPP, EIDL, Employee Retention Credit, loans, etc.
- Businesses must not be debarred, suspended, or otherwise excluded from or ineligible for participation in Federal assistance programs.



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Eligible Use of Funds

- Capital expenditures
 - o Equipment and technology
- Infrastructure
 - o Business façade and improvements, renovations, major repairs, expansion
 - Note: Preference given to owned buildings and those who use local contractors
- Business planning and technical assistance
- Marketing
 - o As included in budget with other items to grow expansion
- Employer attraction – signing bonus
- Workforce development – training

Ineligible Use of Funds

- Debt payments
- Lease payments
- Employee salary and benefits
- Utilities
- Insurance
- Outside business expenses including personal use

Grant Award Amounts

Grant awards will be made up to a max of \$100,000 and a minimum of \$10,000. Grant award distribution will work to meet requested amounts but will ultimately be based on supporting the applicant's business goal in their application. Awardees will have 2 years to implement and complete projects.

Project Qualification Survey

As the first step, each applicant will complete a Project Qualification Survey outlining their basic funding request and business basics, and provide Business Eligibility documents. Review of these documents will determine whether or not a business is eligible to apply for funding. This will help potential applicants avoid developing lengthy proposals which are not competitive. It will also potentially reduce the number of applicants submitting full proposals to a manageable size for thorough review.

If the Project Qualification Survey doesn't align with eligible funding opportunities, varies significantly from the grant purpose and outcomes, or if any of the requested Business Eligibility documents are not available and submitted, the applying business will not be allowed to submit a full application and will be removed from the process and notified of the decision.

The Project Qualification Survey will provide the following information:

- The name and address of the business, and contact information
- Brief introduction and overall goals of the business



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- Eligibility questionnaire
- An approximate amount to be requested for funding, the intended use of the funds, and a brief description of how these funds will help the business achieve the required goals of the grant opportunity. The funding amount requested here is not binding and can be changed if the business is selected for a full application, but applicant must provide an explanation of the need to change the requested amount.

Business Eligibility Document Attachments

- Completed W-9 form
- The business's last four years of tax returns (form 1120, 1120S or 1065) or most recent internal balance sheet and income statement
- Indiana Secretary of State Business Entity Certificate or certificate of assumed business name or doing-business-as (DBA) form record from the County Recorder

Full Application Requirements

- Summary of business plan
- Grant project narrative
- Compliance questionnaire
- Project timeline/workplan
- Detailed budget breakdown and narrative
- Verified employee count – UC-5A form report

Timeline and Application Process

- Project Qualification Survey with Business Eligibility documents open online: March 2024
- Potential applicant meetings for assistance – TBD - Chamber host meetings
- Project Qualification Survey and Business Eligibility Round 1 Review: April 2024
- Potential applicant meetings for assistance – TBD - Chamber host meetings
- Project Qualification Survey and Business Eligibility documents final deadline: June 2024
- Invitation-only full application open: July 2024
- Applicant meetings for assistance – TBD - Chamber host meetings
- Invitation-only full application due: September 2024
- Review and award notification complete: November 2024
- Expend full funds and final report due: November 2026

Application Review Process

United Way staff and the grant oversight committee, comprised of business subject matter experts, will review all Project Qualification Surveys and Business Eligibility documents for completeness and eligibility. Those deemed eligible will be invited to the full application process. The Project Qualification Surveys and Business Eligibility documents will be reviewed by the grant oversight committee in two rounds. Businesses only need to apply by the final deadline, but those who are disqualified from the first round are able to reapply if items can be corrected before the final Project Qualification Survey



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deadline. The grant oversight committee members will be determined prior to opening the project qualification process.

Members of the grant oversight committee could include but not be limited to:

- One appointed member from the Terre Haute City Council - nominated by the President
- Mayor of Terre Haute
- United Way executive leadership
- Terre Haute Chamber executive leadership
- Community Impact Committee volunteers - knowledgeable and familiar with review processes already in place by United Way

After invited applicants complete their full applications, they will be reviewed and scored by review teams that are led by a chair. Each team will be comprised of community members and business leaders. Application reviewers will sign conflict-of-interest forms to ensure applicants will receive impartial treatment.

Each team of reviewers will use a standard scoring rubric to evaluate a set number of applications. Those scores will be used to guide grant funding recommendations by each review team. Those recommendations will then be combined into a single ranked list, and the review team chairs will meet to decide on a final funding recommendation based on the applicants' scores, total number of applicants, and available funds. Final funding recommendations will be approved by United Way's Community Impact Committee (CIC), which oversees the organization's community investments, and United Way's Board of Directors as fiduciary overseers of the organization.

Reporting, Documentation, and Compliance

Each grant award will require a mutually signed grant agreement that details reporting, compliance, and payment requirements. Included in the agreement is a course of action for non-payment and reimbursement if grantees do not follow required procedures.

All payments of the grant will be made on a claim basis from the total award. Detailed receipts will be required for all expenditures. Payments will be made after expenses have been incurred from the grantee, but we understand sometimes cash flow prohibits reimbursement. In those cases, we are able to allow payments of grant funds based on detailed quotes from vendors. Payments made from quotes require detailed receipts of expenditure to verify all expenses.

Awardees will be required to provide grant reports on a 6-month cycle detailing outcomes and updates of their business and proposed project based on their application outcomes. These reports will be narratives and provide photos of progress as available. Reports will be shared with the City of Terre Haute as a means of tracking progress on community grant spending.



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**City of Terre Haute and United Way
Small Business Retention/Expansion Grant Program
Project Qualification Survey**

As the first step, each applicant will complete a Project Qualification Survey outlining their basic funding request and business basics, and provide Business Eligibility documents. This entry will be done in an open survey utilizing Survey Monkey as an easy way for businesses to apply.

Review of these documents will determine whether or not a business is eligible to apply for funding. The answers to these questions will not be evaluated based on their response, but rather to ensure that answers align with the goals of the funding and that the business qualifies to fully apply. This will help potential applicants avoid developing lengthy proposals which are not competitive. It will also potentially reduce the number of applicants submitting full proposals to a manageable size for thorough review.

If the Project Qualification Survey doesn't align with eligible funding opportunities, varies significantly from the grant purpose and outcomes, or if any of the requested Business Eligibility documents are not available and submitted, the applying business will not be allowed to submit a full application and will be removed from the process and notified of the decision.

There will be two rounds of review for Project Qualification and Business Eligibility. All businesses only need to apply once by the final deadline. Those that are deemed ineligible after the first review are able to resubmit by the final deadline if their project can be revised or they can remedy disqualification issues.

Project Qualification Survey

1. Name of business
2. Address of business location requesting funds
3. Business owner name, email, and phone number
4. Point of contact for funding if different than owner: name, title, email and phone number
5. Current employee count
6. Date that business began operation (month/year)
7. A short introduction to business and overall goals
8. How did the COVID-19 pandemic negatively impact your business?
9. Amount of funding requested - The funding amount requested here is not binding and can be changed if the business is selected for a full application, but applicant must provide an explanation of the need to change the requested amount.
10. What is the intended use of the funds?
11. Is this funding part of a larger project? If so, what is the overall project budget? Please highlight any additional outside grant funding being utilized.



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12. How will this funding help your business achieve one of the below goals? Include which goal/goals you are working toward and the projected outcome that will result from the funding.
- a. Retain existing businesses
 - b. Retain existing employees
 - c. Increase revenue
 - d. Increase employees

Check mark questions with yes/no:

1. Is the business locally owned and operated?
2. Is the business a subsidiary of larger corporation?
 - a. If yes, please explain.
3. Is the business a publicly traded company?
4. Is the business in good standing with the Indiana Secretary of State as a Business Entity or if a sole proprietorship does the business have a certificate of assumed business name or doing-business- as (DBA) form record from the County Recorder?
 - a. If no, please explain.
5. Are you a minority, women or veteran-owned business?
 - a. If yes, have you received state or federal MBE or WBE certification?
6. Is your business facing any pending litigation or legal action?
 - a. If yes, please explain.
7. Has your business received any prior COVID-related funding to date like PPP, EIDL, Employee Retention Credit, loans, etc.?
 - a. If yes, please list.
8. Has your business been be debarred, suspended, or otherwise excluded from or ineligible for participation in Federal assistance programs?

Business Eligibility Documents to be Attached to Survey

- Completed W-9 form
- The business's last four years of tax returns (form 1120, 1120S or 1065) or most recent internal balance sheet and income statement
- Indiana Secretary of State Business Entity Certificate or a certificate of assumed business name or doing-business- as (DBA) form record from the County Recorder



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**City of Terre Haute and United Way
Small Business Retention/Expansion Grant Program
Application Sample**

Application Overview

United Way uses Seabrook's e-CImpact™ Grant Management Community Impact Software system for submission and review of issued funding opportunities. The grant application will require the following content to be completed and submitted online by the applicant.

Business Information (Open text box answers)

1. Business name
2. Business address
3. Business description – provide information about your business including high-level business plan information on target customers, what you do, how you do it, etc.
4. Number of employees – provide verification in attachments
5. Describe the negative impact on your business created by COVID-19 pandemic.
6. What is the overall goal of the project you are seeking funding for, and how do they align with the Small Business Retention/Expansion Grant Program? The goals of the Small Business Retention/Expansion Grant Program are to retain existing businesses, retain existing employees, increase revenue, or increase employees.
7. Funding request amount

Compliance (All questions yes/no text box and subsequent follow-up text boxes for explanations)

1. Is the business locally owned and operated?
 - a. Please provide owner's name.
2. Is the business in good standing with the Indiana Secretary of State as a Business Entity?
 - a. If no, you are ineligible to apply.
3. Does the business have any threatened or pending litigation?
 - a. If yes, please explain.
4. Does the business have any current or past IRS complications?
 - a. If yes, please explain.
5. Is the business in compliance with current state and local government tax regulations?
 - a. If no, please explain.
6. Is the business minority, woman or veteran owned?
 - a. If yes, please elaborate on which category applies and the percent of ownership. Also, if certified, provide documentation in the Additional Documents Attachment in the application.
7. Did the business receive any previous COVID-19 funding including PPP, EIDL, Employee Retention Credits, loans, or any other COVID-focused assistance?
 - a. If yes, please disclose what type of funding and the amount of assistance
8. If seeking funding for infrastructure projects, does the organization own the building they are seeking funding assistance for?
 - a. If no, please explain ownership structure.



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Project Narrative (Text boxes)

The project narrative should provide a simple but detailed description of what the applicant is intending to do with the grant funding. The narrative should also describe how the grant funds will help the program achieve the required goals of the Small Business Retention/Expansion Grant program.

- a. Project summary – (750 words or less)
- b. Describe the intended use of the requested grant funding.
- c. How does this funding work into your overall business plan?
- d. How will this funding help you to achieve the goal of the project?
- e. Describe your plan to ensure the longevity and sustainability of your business after the grant period ends and funds have been expended.

Project Workplan (Attachment - Sample will be provided)

The applicant should develop a detailed work plan that will outline all activities described in the project narrative. The workplan should be laid out as a table and contain the following minimum elements:

- **Activities:** All activities should be included in the workplan as line items.
- **Responsible party:** For each activity in the workplan, identify the entity and/or employee responsible and/or involved in the activity.
- **Timeline:** Outline the specific time period, with start dates and end dates, during which each activity will occur.

The workplan should contain all required elements to fully implement the proposed project and achieve the required outputs/outcomes, including key meetings, development time, identified milestones, reporting requirements, target outputs/outcomes achieved, etc. There will be a sample available that applicants can use as a template.

Project Budget & Budget Narrative (Attachment - Sample will be provided)

The Project Budget and Budget Narrative is a single document. The applicant may choose the format, making sure the financial content and associated narrative explanations are easy to review and understand. There will be a sample available that applicants can use as a template.

The budget should present—as completely as possible—an itemization of all proposed costs for the two years of the project. It should account for all grant funding requested and provide the details for each budget line item for the proposal, listing the total cost of each with the associated narrative explaining how such items were calculated. The budget should also represent the entire project and include the use of additional funding outside of the grant funding.

The budget narrative should expand upon the budget by explaining the details of how the funds will be used and how the budget will allow for sustainability of the business.



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Attachment Documents

- Workplan
- Project Budget and Narrative
- Documentation verifying employee count

Additional Attachments - at discretion of applicant

Provide any additional information that would help create the best application. This could include photos or plans of your intended project, business certifications, etc.

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City of Terre Haute
Small Business Retention/Expansion Grant Program
Sample Work Plan Template

This is a sample Work Plan template. It is provided as an example of the type of Work Plan required in the grant application. Other types are acceptable. The requirements of the Work Plan are listed in the application documentation.

Business Name:

Goal:

Measurable Outcome(s):

* Time Frame (Start/End Dates by Month in Project Cycle)

Major Objective	Key Tasks	Start Date	End Date	Responsible Staff/Party
<i>Example: Implement new Point-of-Sale system</i>	<i>Research and purchase system</i>	<i>January 2024</i>	<i>February 2024</i>	<i>Business Owner</i>
	<i>Train staff and launch system</i>	<i>April 2024</i>	<i>May 2024</i>	<i>General Manager</i>

You can add and format as many major objectives as you need for your project.

**City of Terre Haute
Small Business Retention/Expansion Grant Program
Sample Budget and Narrative**

Business Name:

The budget should present—as completely as possible—an itemization of all proposed costs for the two years of the project. It should account for all grant funding requested and provide the details for each budget line item for the proposal, listing the total cost of each with the associated narrative explaining how such items were calculated. The budget should also represent the entire project and include the use of additional funding outside of the grant funding.

Item	Description	Cost per unit	# of Units	Cost
Project Total:				

Example:

Item	Description	Cost per unit	# of Units	Cost
Point-of-Sale System	POS system	\$1,500.00	1	\$1,500.00
Wireless Internet Technology	Equipment and installation	\$1,500.00	1	\$1,500.00
Exterior paint-gallon	Dining room renovation, 2 colors	\$42.00	2	\$84.00
Paint brushes	Dining room renovation – 4 brushes	\$7.99	4	\$31.96
Furniture	10 tables	\$75.00	10	\$750.00
Furniture	40 chairs	\$35.00	40	\$1,400.00
Dining Room Renovation	Jim Construction – New half-wall install and flooring update	\$30,000.00	1	\$30,000.00
Project Total:				\$35,265.96

Budget Narrative:

The budget narrative should expand upon the budget by explaining the details of how the funds will be used and how the budget will allow for sustainability of the business.



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City of Terre Haute and United Way Nonprofit Grant Program

Funding
\$750,000

Purpose

The goal of this grant program is to provide financial support for nonprofits in the City of Terre Haute to respond to the negative impacts of the COVID-19 pandemic. The COVID-19 pandemic disrupted nearly all aspects of support services from local community nonprofits increasing needs in programing and staffing while crippling fundraising efforts. These grants are intended to help alleviate the pressure of operational supports for nonprofits and allow them to build capacity and organizational development that responds and adapts to the growing needs of our most vulnerable in the City of Terre Haute. These grants are designed to help organizations work more efficiently and effectively and are meant to aid development at a structural level, increasing an organization's ability to deliver on its mission over time. They are not intended to cover routine core operating expenses nor provide on-going programmatic support.

Capacity building and organizational development are not just about the capacity of a nonprofit today: they're about the nonprofit's ability to deliver on its mission effectively now and in the future. Capacity building is an investment in the effectiveness and future sustainability of a nonprofit.

Goals

Build capacity and organizational development of nonprofit community
Strengthen organization's infrastructure, management, and/or governance
Increase organizational effectiveness

Eligibility of Applicants

- Organization based in the City of Terre Haute limits
- Must have been in operation in the City of Terre Haute since March 2020 and must still be in operation.
- Must be able to describe a negative impact created by the COVID-19 pandemic to their organization to qualify for funding.
- Applicant must be a registered 501(c)(3) or 501(c)(19) organization
- Must disclose information on any pending litigation or legal actions
- Preference will be given to those who did not receive previous COVID-19 funding like PPP, EIDL, Employee Retention Credit, loans, etc.



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Eligible Use of Funds

- Organizational planning and technical assistance
 - o Strategic planning
 - o Succession planning
 - o Fund development planning
 - o Establishing or upgrading a volunteer/donor management system
 - o External communication strategy planning and execution
- Staff development and training for employee retention
 - o Conferences, trainings, or workshops that promote skill development or mission-focused development. Opportunities must be significantly related to the applicant's position and the agency's mission. The applicant should be able to prove how the opportunity will improve their ability to do their job.
 - Examples of opportunities include conferences such as the National Mentoring Summit, courses at the Indiana University Lilly Family School of Philanthropy, or memberships to training organizations like the Non-Profit Learning Lab for ongoing skill development programs.
 - Funds may be used for registration fees or tuition reimbursement and one of the following: hotel expenses, mileage reimbursement, or airfare reimbursement.
- Capital expenditures
 - o Equipment, technology upgrades, licensing fees, and software
- Infrastructure
 - o Improvements, renovations, major repairs, expansion
 - Note: Preference given to owned buildings and those who use local contractors
- Match for other major grants or funding opportunities that relate to capacity building

Ineligible Use of Funds

- Debt payments
- Building lease
- Utilities
- Insurance
- Ongoing programmatic support
- Routine operating expenses

Grant Award Amounts

Grant awards will be made up to a max of \$50,000 and a minimum of \$10,000. Grant amounts will be based on supporting the applicant's goal in their application. Awardees will have 18 months to complete projects.



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Project Qualification Survey

As the first step, each applicant will complete a Project Qualification Survey outlining their basic funding request, and provide Stewardship Package documents. Review of these documents will determine whether or not an organization is eligible to apply for funding. This will help potential applicants avoid developing lengthy proposals which are not competitive. It will also potentially reduce the number of applicants submitting full proposals to a manageable size for thorough review.

If the Project Qualification Survey doesn't align with eligible funding opportunities, varies significantly from the grant purpose and outcomes, or if any of the requested Stewardship Package documents are not available and submitted, an organization will not be allowed to submit a full application and will be removed from the process and notified of the decision.

The Project Qualification Survey will provide the following information:

- The name and address of the organization, contact information, and confirmation of the tax status of the organization/program
- Description of how the proposal fits the goals listed for this grant opportunity
- Summary of the organization's goals
- An approximate amount to be requested for funding, the intended use of the funds, and a brief description of how these funds will help the program achieve the required outputs/outcomes listed for this grant opportunity. The funding amount requested here is not binding and can be changed if the program is selected for a full application.

Stewardship Package Requirements

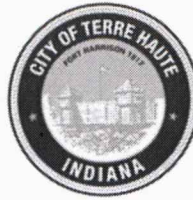
- Prior fiscal year organizational budget for the applying organization
- Board of Directors roster
- Minutes of a recent board meeting
- Proof of financial oversight (audited financial statements or letter from accountant)
- IRS determination letter

Full Application Requirements

- Organizational information
- Grant project narrative
- Project timeline
- Detailed budget breakdown and narrative
- Last four years of IRS 990 filings
- Additional documents – letters of support (not required – at discretion of applicant)



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Timeline and Application Process

- Project Qualification Survey and Stewardship Package open online: March 2024
- Potential applicant meetings for assistance: TBD
- Project Qualification Survey and Stewardship Package due: May 2024
- Invitation-only full application opens online: May 2024
- Applicant meeting for assistance: TBD
- Invitation-only full application due: July 2024
- Review and award notification complete: October 2024
- Expend full funds and final report due: April 2026

Application Review Process

United Way staff and the grant oversight committee members will review all Project Qualification Surveys and Stewardship Package documents for completeness and eligibility. Those deemed eligible will be invited to the full application process. Grant oversight committee members will be determined prior to opening the project qualification process.

Members of the grant oversight committee could include but not be limited to:

- One appointed member from Terre Haute City Council - nominated by the President
- Mayor of Terre Haute
- United Way executive leadership
- Community Impact Committee volunteers

After invited applicants complete their full applications, they will be reviewed by review teams that are comprised of community members. Application reviewers will sign conflict-of-interest forms to ensure applicants will receive impartial treatment.

Each team of reviewers will use a standard scoring rubric to evaluate a set number of applications. Those scores will be used to guide grant funding recommendations by each review team. Those recommendations will then be combined into a single ranked list, and the review team chairs will meet to decide on a final funding recommendation based on the applicants' scores, total number of applicants, and available funds. Final funding recommendations will be approved by United Way's Community Impact Committee (CIC), which oversees the organization's community investments, and United Way's Board of Directors as fiduciary overseers of the organization.

Reporting, Documentation, and Compliance

Each grant award will require a mutually signed grant agreement that details reporting, compliance, and payment requirements. Included in the agreement is a course of action for non-payment and reimbursement if grantees do not follow required procedures.



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All payments of the grant will be made on a claims basis from the total award. Detailed receipts will be required for all expenditures. Most payments will be made after expenses have been incurred from the grantee, but we understand sometimes cash flow prohibits reimbursement. In those cases, we are able to allow payments of grant funds based on detailed quotes from vendors. Payments made from quotes require detailed receipts of expenditure to verify all expenses.

Awardees will be required to provide grant reports on a 6-month cycle detailing outcomes and updates of their business and proposed project based on their application outcomes. These reports will be narratives and provide photos of progress as available. Reports will be shared with the City of Terre Haute as a means of tracking progress on community grant spending.

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**City of Terre Haute and United Way
Nonprofit Grant Program
Project Qualification Survey**

As the first step, each applicant will complete a Project Qualification Survey outlining their basic funding request and organization's basics, and provide Stewardship Package documents. This entry will be done in an open survey utilizing Survey Monkey as an easy way for organizations to apply.

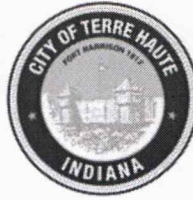
Review of these documents will determine whether or not an organization is eligible to apply for funding. The answers to these questions will not be evaluated based on their response, but rather to ensure that answers align with the goals of the funding and that the organization qualifies to fully apply. This will help potential applicants avoid developing lengthy proposals which are not competitive. It will also potentially reduce the number of applicants submitting full proposals to a manageable size for thorough review.

If the Project Qualification Survey doesn't align with eligible funding opportunities, varies significantly from the grant purpose and outcomes, or if any of the requested Stewardship Package documents are not available and submitted, the applying organization will not be allowed to submit a full application and will be removed from the process and notified of the decision.

1. Name of organization
2. Address of organization
3. Point of contact for funding: name, title, email and phone number
4. Date the organization began operation (month/year)
5. Are you a 501(c)(3) or 501(c)(19) organization?
6. A short introduction to the organization and overall goals
7. How did the COVID-19 pandemic negatively impact your organization?
8. Amount of funding requested - The funding amount requested here is not binding and can be changed if the organization is selected for a full application, but applicant must provide an explanation of the need to change the requested amount.
9. What is the intended use of the funds?
10. Is this funding part of a bigger project? If so, what is the overall project budget?
11. How will this funding help your organization achieve one of the below goals? Include which goal/goals you are working toward and the projected outcome that will result from the funding.
 - a. Build capacity and organizational development of nonprofit community
 - b. Strengthen organization's infrastructure, management, and/or governance
 - c. Increase organizational effectiveness
12. Has your organization received any prior COVID-related funding to date like PPP, EIDL, Employee Retention Credit, loans, etc.?
 - a. If yes, please explain.



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13. Has your business been debarred, suspended, or otherwise excluded from or ineligible for participation in Federal assistance programs?
- a. If yes, please explain.

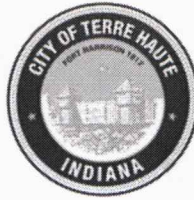
Stewardship Package requirements to be attached to the survey

- Prior fiscal year organizational budget for the applying organization
- Board of Directors roster
- Minutes of a recent board meeting
- Proof of financial oversight (audited financial statements or letter from accountant)
- IRS determination letter

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**City of Terre Haute and United Way
Nonprofit Grant Program
Application Sample**

Application Overview

United Way uses Seabrook's e-CImpact™ Grant Management Community Impact Software system for submission and review of issued funding opportunities. The grant application will require the following content to be completed and submitted online by the applicant.

Organization Information (Open text box answers)

1. Organization name
2. Organization address
3. Organization mission
4. Organization description – provide the goals of your organization including what you do and how you do it.
5. Number of staff – full and part-time labeled
6. Describe the negative impact on your organization created by the COVID-19 pandemic.
7. What is the overall goal of the project you are seeking funding for and how does it align with the goals of the Nonprofit Grant Program? The goals of the program are to build capacity and organizational development of nonprofit community, strengthen organization's infrastructure, management, and/or governance, and increase organizational effectiveness.
8. Funding request amount

Compliance (All questions yes/no text box and subsequent follow-up text boxes for explanations)

1. Is the organization in good standing with the Indiana Secretary of State as a Business Entity?
 - a. If no, you are ineligible to apply.
2. Does the organization have any threatened or pending litigation?
 - a. If yes, please explain.
3. Does the organization have any current or past IRS complications?
 - a. If yes, please explain.
4. Is the organization in compliance with current state and local government tax regulations?
 - a. If no, please explain.
5. Did the organization receive any previous COVID-19 funding including PPP, EIDL, Employee Retention Credits, loans, or any other COVID-focused assistance?
 - a. If yes, please disclose what type of funding and the amount of assistance.
6. If seeking funding for infrastructure projects, does the organization own the building they are seeking funding assistance for?
 - a. If no, please explain ownership structure.

Project Narrative (Text boxes)

The project narrative should provide a simple but detailed description of what the applicant is intending to do with the grant funding. The narrative should also describe how the grant funds will help the program achieve the required goals of the Nonprofit Grant program.



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- a. Project summary – (750 words or less)
- b. Describe the intended use of the requested grant funding.
- c. How does this funding create capacity or provide a more solid foundation for your organization?
- d. How will this funding help you to achieve the goal of the project?
- e. Describe your plan to ensure the longevity and sustainability of your organization efforts after the grant period ends and funds have been expended.

Project Workplan (Attachment - sample will be provided)

The applicant should develop a detailed work plan that will outline all activities described in the project narrative. The workplan should be laid out as a table and contain the following minimum elements:

- **Activities:** All activities should be included in the workplan as line items.
- **Responsible party:** For each activity in the workplan, identify the organization and/or employee responsible and/or involved in the activity.
- **Timeline:** Outline the specific time period, with start dates and end dates, during which each activity will occur.

The workplan should contain all required elements to fully implement the proposed project and achieve the required outputs/outcomes, including key meetings, development time, identified milestones, reporting requirements, target outputs/outcomes achieved, etc. There will be a sample available that applicants can use as a template.

Project Budget & Budget Narrative (Attachment - sample will be provided)

The Project Budget and Budget Narrative is a single document. The applicant may choose the format, making sure the financial content and associated narrative explanations are easy to review and understand. There will be a sample available that applicants can use as a template.

The budget should present—as completely as possible—an itemization of all proposed costs for the project timeline. It should account for all grant funding requested and provide the details for each budget line item for the proposal, listing the total cost of each with the associated narrative explaining how such items were calculated. The budget should also represent the entire project and include the use of additional funding outside of the grant funding.

The budget narrative should expand upon the budget by explaining the details of how the funds will be used and how the budget will allow for sustainability of the business.

Additional Documents (Attachments)

- Provide the last four years IRS 990 filings
- At your discretion - provide any additional information that would help create the best application. This could include photos or plans of your intended project, letters of support, etc.

**City of Terre Haute
Nonprofit Grant Program
Sample Work Plan Template**

This is a sample Work Plan template. It is provided as an example of the type of Work Plan required in the grant application. Other types are acceptable. The requirements of the Work Plan are listed in the application documentation.

Organization Name:

Goal:

Measurable Outcome(s):

* Time Frame (Start/End Dates by Month in Project Cycle)

Major Objective	Key Tasks	Start Date	End Date	Responsible Staff/Party
<i>Example: Donation Management System</i>	<i>Research and purchase system</i>	<i>January 2024</i>	<i>February 2024</i>	<i>Executive Director</i>
	<i>Train staff and launch system</i>	<i>April 2024</i>	<i>May 2024</i>	<i>Executive Director/ Development Director</i>

You can add and format as many major objectives as you need for your project.

**City of Terre Haute
Nonprofit Grant Program
Sample Budget and Narrative**

Organization Name:

The budget should present—as completely as possible—an itemization of all proposed costs for the 18 months of the project. It should account for all grant funding requested and provide the details for each budget line item for the proposal, listing the total cost of each with the associated narrative explaining how such items were calculated. The budget should also represent the entire project and include the use of additional funding outside of the grant funding.

Item	Description	Cost per unit	# of Units	Cost
Project Total:				

Example:

Item	Description	Cost per unit	# of Units	Cost
<i>Donation Management System</i>	<i>GiveToday license and set-up fee</i>	<i>\$2,000.00</i>	<i>1</i>	<i>\$1,500.00</i>
<i>Wireless Internet Technology</i>	<i>Equipment and installation</i>	<i>\$1,500.00</i>	<i>1</i>	<i>\$1,500.00</i>
<i>Staff Training</i>	<i>IU School of Philanthropy Elements of Fundraising Course – 2 attendees</i>	<i>\$1,000.00</i>	<i>2</i>	<i>\$2,000.00</i>
Project Total:				\$5,000.00

Budget Narrative:

The budget narrative should expand upon the budget by explaining the details of how the funds will be used and how the budget will allow for sustainability of the business.



Gary C. Doty
Commercial Radio Service, Inc.
915 South Prospect Street
Terre Haute, IN 47802

Phone: (812) 235-8694
Cell: (812) 249-1631

Email: gcdoty@commercialradioservice.net

February 7, 2024

Mayor Brandon Sakbun
17 Harding Avenue
Terre Haute, IN

Reference: Radio Communications Proposals
Equipment by L3 Harris

Dear Mayor Sakbun,

The following information is a proposal to replace the aging communication system that the city's service departments currently use for two-way radio communications. This radio network is approaching its twenty-fifth year of continuous operation. It has served the city well but is beyond its service life. Twenty-five years ago, it was state of the art, now the digital age has moved forward. The federal government has mandated that new or upgraded radio equipment must be interoperable with and support the P25 digital communication protocol.

The proposal is 100% compliant with the P25 mandates and incorporates the most up to date P25 Phase 2 digital protocol. By incorporating the P25 standard, the proposed new communication system will be capable and 100% ready to be used as a backup, or second means of communication to the Police and Fire Departments when the need arises.

As a prerequisite to produce the following proposals, I was in contact with the various city departments and discussed their needs and requirements referring to the replacement of mobile and portable radios. The current subscriber count is 152 units. The five channel Phase 2 infrastructure as proposed has the capacity to handle 2 or 3 times that number of radios. Commercial Radio Service is an authorized L3Harris service center and can perform repairs and warranty service for equipment in this proposal.

Thank you for the opportunity to be of service.
Gary C. Doty

Scope of the P25 Phase 2 Radio System Upgrade

Home Avenue Site Preparation:

- Replacement of the 240-volt uninterruptable power supply with a 48-volt DC power supply with battery back-up.
- Service the existing backup generator system and add remote monitoring capabilities. The current generator is 25 years old and will need to be replaced in the not-too-distant future. For budgetary reasons we have deferred replacement at this time.
- Check and test the existing antenna system, sweep the coax feedlines, check, and tune transmitter and receiver combining equipment if necessary. Climb the tower to inspect for loose hardware and reseal coax connectors.
- Request and receive an internet broadband connection. This internet communication will support and facilitate remote access to the system for system ID management as well as performance monitoring.

System Infrastructure Preparation and Installation:

- System set-up and staging at factory. Commercial Radio Service sends two technicians to participate in the process to aid in the customization and receive factory certification.
- Meet with departments to design and produce the fleet map, identify unit ID's and alias names. Program mobiles and portables.
- Stage base station equipment at Home Avenue location. Set cut over date, prepare departments with the distribution of the portable radios and install critical mobiles and desktop stations.
- Cut over day, we switch from using the existing EDACS system at the Home Avenue site to using the City's backup system at Commercial Radio's West Terre Haute tower site. At this point we will be able to install the new P25 infrastructure at Home Avenue with near zero interruption of the service to the city departments. Continue installing the remaining radios and desktop stations.
- Prepare inventory, maintenance, and performance documentation to be presented to city administration.

Mobile and Portable Radios Requested by Departments

Cemetery Maintenance Departments

7 Mobiles
6 Portables
1 Desk Top station

City Administration/Mayor's Office

6 Portables

Code Enforcement

12 Portables

Transit Utility:

16 Mobiles
5 Portables
5 Desk Top Stations

Park Department:

28 Portables
2 Desk Top Stations

Street Department:

46 Mobiles
14 Portables
3 Desk Top Stations

Spare:

1 spare Portable

TOTALS:	Mobiles	69
	Portables	72
	Desk Top Station	<u>11</u>
		152 Subscriber Units

L3Harris Corporation

This proposal is for equipment and services from L3Harris Corporation. L3Harris is one of the leading defense contractors in the United States. They were the supplier of the current communication system that has lasted 25 years. The L3Harris two-way radio division headquarters is in Lynchburg Virginia.

L3Harris Infrastructure (Home Avenue):

5-P25 Phase 2 100-watt continuous duty base stations. Complete with associated equipment to make a complete RF system	\$208,423.00
VIDA CORE Network Controller/server network equipment	110,686.00
Factory setup and staging	46,595.00
Commercial Radio Service on site installation, programming and administrative services.	20,000.00
48-volt DC power system with battery back-up capability.	15,000.00
Total Equipment and Services (Home Avenue):	\$400,704.00
Includes 2 years hardware/software support.	

L3 Harris Subscriber Units:

<u>Qty</u>	<u>Part number</u>	<u>Description</u>	<u>Price</u>	<u>Total</u>
72	XL-45P	Portable radio package Standard scan radio color display, extra capacity battery, antenna, belt clip and desk charger	\$2068.00	\$148,896.00
80	XG-25M	Mobile radio package Standard front mount Accessories, antenna and Install included	\$2694.00	\$215,520.00
11	Desk kit	Desk top station kit Including 12-volt power supply, Microphone, antenna and Coax kit	\$ 800.00	\$ 8,800.00
80	Service	Install services and antenna kits for mobile radio and desktop stations	200.00	\$ 16,000.00
Total Subscriber Costs including programming and install				\$389,216.00

Project Cost Summation:

System Infrastructure Home Avenue	\$400,704.00
Subscriber Units Mobile and Portables	\$389,216.00

Total Cost: **\$789,920.00**

Proposed with State of Indiana QPA
26% Discount Applied

Note: Included in the cost is the first 2 years hardware/software warranty and support. Starting year three there will be an optional monthly charge of \$2650.00 for Commercial Radio Service to continue to provide hardware warranty, software support as well as administrative and supervision of the system infrastructure at Home Avenue.

Estimated cost of replacement generator is \$20,000.00.