



# OFFICE OF THE CITY CLERK

## BIANCA L. TIRADO, CITY CLERK

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### **09-12-2024 | 2025 Community Investment Budget Meeting Questions**

#### **Questions From Council (Not Answered on the Floor)**

Question #1 (Citizen Member Angela Smith): Is there an update regarding the City's RFP's, and how many are coming to fruition?

Question #2 (Councilmember Sheila Niezgodski): Is there an update regarding the 2021 lead remediation grant?

#### **Questions From the Public (Not Answered on the Floor)**

None.

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### **ANSWERS**

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#### **RFP Results:**

Scattered Site RFP Proposal release late 2022

- 50 affordable units with Advantix
- 6-unit SB Heritage building at Washington/Taylor
- 17-unit mixed income deal with Allen/Edwin
- Indirectly led to mixed-income units deal with 466works (30 houses total with 17 on City-owned lots)

Lafayette Building RFP released early 2023

- Purchase Agreement for rehab of building, still in due diligence phase

INTEGRITY | SERVICE | ACCESSIBILITY

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Elivet Quijada-Navarro  
CHIEF OF STAFF / CHIEF DEPUTY CITY CLERK

Matthew Neal  
DEPUTY CITY CLERK / DIRECTOR OF POLICY

Samuel Turck  
DIRECTOR OF SPECIAL PROJECTS

EXCELLENCE | ACCOUNTABILITY | INNOVATION | INCLUSION | EMPOWERMENT

455 County-City Building | 227 W. Jefferson Blvd. | South Bend, Indiana 46601 | p. 574.235.9221 | f. 574.235.9173 | www.southbendin.gov



Former Gates Auto shop RFP

- 4 proposals submitted, staff reviewing now

River Glenn RFP

- No proposals received

Small NNN Scattered Site RFP

- Indirectly led to 10 rental units (5 new duplexes) with Property Bros LLC near Sherman/Lincoln Way West
- Indirectly led to Intend Indiana project (92 houses total with 43 on City-owned lots)

**Tax Abatements**

Annual report attached.

**FY21 Lead Grant**

\$2.45M remaining in current grant cycle, with \$715,000 expended. DCI is re-allocating some staff resources to provide additional support to program administrator.

**Pre-Approved Plans**

In 2025, we are planning to update cost estimates for the pre-approved plans to reflect current material and labor pricing. We will likely plan a two-year update cycle for that going forward.

**Part 1: Real Property Tax Abatement Summary - 2023**

**68 Active Tax Abatements**

Corporation	Project Information	Confirming Resolution Number	Start Pay Year	Years Granted	Expected End Pay Year	Estimated Project Cost	Actual Project Cost	Estimated Completion Date	Actual Completion Date	Announced Retained Jobs	Actual Retained Jobs	Announced New Jobs	Actual New Jobs	Compliance* (0-6)
Five Corners LLC	5 Corners (1144 Corby Blvd.) - RPTA 2023	5046-23	Not Started	10		\$ 24,500,000		8/31/2025		0		9		0
4018 South Bend LLC	6701 Nimitz Parkway - RPTA 2019	4785-19	2022	6	2027	\$ 12,940,000	\$ 10,049,989	3/31/2020	11/5/2020	0	2	0	1	1
Advantix Development Corporation	Advantix Affordable Scattered Site Development - RPTA 2023	5041-23	Not Started	10		\$ 14,000,000				0		2		0
GLC Portage Prairie, LLC	AM General - Portage Prairie - RPTA 2023	5033-23	2025	9	2033	\$ 12,000,000		6/1/2024		76	107	15		1
Bald Mountain LLC	Bald Mountain, LLC (213-217 S. Main Street) - RPTA 2017	4693-17	2021	6	2027	\$ 9,000,000	\$ 4,616,000	8/31/2020	8/31/2020	0	0	15	39	1
David A Nufer LLC	Burtons Laundry (521 N. William St.) - RPTA 2023	5027-23	2025	4	2028	\$ 1,600,000	\$ 1,573,365	12/31/2023	12/15/2023	4	4	0	0	1
1173 South Bend DST	Catalyst Three (1173 Ignition Drive) - RPTA 2019	4781-19	2022	8	2030	\$ 16,000,000	\$ 14,865,748	7/1/2021	7/1/2021					2
CBK Land Development LLC / Chase Plastics	CBK Land Development LLC (Chase Plastics Addition) - RPTA 2019	4779-19	2023	7	2029	\$ 3,500,000	\$ 3,636,260	1/31/2020	5/26/2020	18	18	13	3	2
CBK Land Development LLC / Chase Plastics	CBK Land Development LLC (Chase Plastics) - RPTA 2014	4406-14	2018	10	2027	\$ 4,885,376	\$ 5,163,301	12/31/2015	12/21/2015	12	12	13	9	1
GFC Holdings, LLC / Claeys Candy	Claeys Candy (Nimitz Parkway) - RPTA 2021	4893-21	2023	9	2032	\$ 5,500,000	\$ 7,416,925	4/1/2022	10/31/2022	30	30	3	0	2
Colfax Hill Partners, LLC	Colfax Hill Partners (525 E. Colfax) - RPTA 2014	4364-14	2018	8	2025	\$ 3,000,000	\$ 2,953,000	7/1/2016	9/28/2016					1
Commerce Center Development, LLC	Commerce Center (300 E. LaSalle) - RPTA 2017	4613-17	2022	10	2031	\$ 35,475,000	\$ 45,000,000	6/15/2022	6/15/2022					4
Nilkanth Properties, LLC	Dairy Queen (4836 W. Western Ave.) - RPTA 2018	4691-18	2021	7	2027	\$ 1,660,661	\$ 1,600,000	5/30/2019	6/24/2019			40	45	1
Delta Management Company, LLC	Delta Management Company (4755 Ameritech Drive) - RPTA 2021	4895-21	2024	5	2028	\$ 1,800,000	\$ 1,800,000	4/1/2022	6/30/2022	50	50	10	10	1
Diamond View Apartments, LP	Diamond View Apartments (Affordable Multi-Family) - RPTA 2023	5023-23	Not Started	8		\$ 9,885,500		3/1/2025		0		2		0
Five Corners LLC	Five Corners LLC (1130 South Bend Ave.) - RPTA 2019	4811-19	2022	7	2029	\$ 4,315,000	\$ 4,300,000	5/1/2021				87	53	2
GLC Portage Prairie, LLC	GLC Portage Prairie - RPTA 2015	4483-15	2018	8	2026	\$ 7,000,000	\$ 7,892,494	1/31/2017	12/31/2018			15	107	1

Corporation	Project Information	Confirming Resolution Number	Start Pay Year	Years Granted	Expected End Pay Year	Estimated Project Cost	Actual Project Cost	Estimated Completion Date	Actual Completion Date	Announced Retained Jobs	Actual Retained Jobs	Announced New Jobs	Actual New Jobs	Compliance* (0-6)
GLC Portage Prairie II, LLC	GLC Portage Prairie II - RPTA 2017	4610-17	2020	9	2029	\$ 7,700,000	\$ 7,436,811	12/31/2018	12/31/2018			10	43	1
GLC Portage Prairie IV, LLC	GLC Portage Prairie IV - RPTA 2019	4783-19	2021	6	2028	\$ 7,200,000	\$ 7,512,000	6/1/2021						1
GLC Portage Prairie V, LLC	GLC Portage Prairie V - RPTA 2022	4957-22	2025	7	2031	\$ 15,000,000		12/1/2023				50		1
SWGS Properties, LLC / Grace Steel, LLC	Grace Steel (2920 W. Sample) - RPTA 2019	4767-19	2021	6	2026	\$ 500,000	\$ 828,663	12/31/2020	12/31/2020			10	10	1
Hibberd Development, LLC	Hibberd Development - RPTA 2017	4622-17	2020	5	2024	\$ 5,250,000	\$ 5,042,919	8/31/2018	12/7/2018			32	65	1
JMS Development, LLC	Historic JMS Building - RPTA 2015	4461-15	2019	10	2029	\$ 7,600,000	\$ 7,918,704	3/1/2017	12/31/2017			8	17	1
Hoffman Hotel Apartments Housing Partnership, LP	Hoffman Hotel Apartments (120 W. LaSalle) - RPTA 2013	4286-13	2016	10	2025	\$ 1,500,000	\$ 1,500,000	7/1/2016	7/1/2016			0	1	1
Hopkins Properties of South Bend, LLC	Hopkins Properties of South Bend (4373 Ameritech Drive) - RPTA 2019	4777-19	2022	7	2028	\$ 18,000,000	\$ 18,794,041	1/1/2021	4/1/2021	42	30	30	38	1
Imagineering Enterprises, Inc.	Imagineering Enterprises, Inc. (3722 Foundaton Ct.) - RPTA 2018	4741-18	2023	6	2028	\$ 1,500,000	\$ 1,767,004	4/15/2017	4/16/2019	41	41	15	70	1
JEM Farms South Bend, LLC	JEM Farms South Bend - RPTA 2022	4940-22	Not Started	9		\$ 60,000,000								0
JSK Development, Inc. / Ireland Hospitality, LLC	JSK Development, Inc. (Ireland Hospitality; Southside Hotel) - RPTA 2015	4467-15	2019	6	2024	\$ 6,000,000	\$ 5,000,000	12/31/2018	7/10/2018			14	30	1
JSK Development, Inc. / DTC Hospitality, LLC	JSK Development, Inc. (Southhold LLC; Downtown Hotel) - RPTA 2015	4457-15	2019	9	2027	\$ 8,750,000	\$ 9,927,576	3/1/2017	4/3/2018			38	49	1
KCG Companies, LLC	KCG (LIHTC Project) - RPTA 2023	5038-23	Not Started	10		\$ 12,323,616				0		1		0
LaSalle Partners RA LLC	LaSalle Apartments - RPTA 2016	4535-16	2018	10	2028	\$ 9,537,076	\$ 12,709,425	9/1/2016	12/30/2016	9	3			2
The Tower at Washington Square LLC	Liberty Tower - Apartments - RPTA 2018	4745-18	2019	10	2028	\$ 12,597,000		1/1/2019				6	0	2
The Tower at Washington Square LLC	Liberty Tower - Apartments & Outdoor Space - RPTA 2023	5014-23	Not Started	8		\$ 14,700,000		4/15/2024		0		9		0
The Tower at Washington Square LLC	Liberty Tower - Garage - RPTA 2018	4743-18	2019	10	2028	\$ 2,238,000	\$ 1,073,000	7/1/2017	1/1/2018			1		1
The Tower at Washington Square LLC	Liberty Tower - Hotel - RPTA 2018	4742-18	2020	10	2029	\$ 15,245,274	\$ 17,139,115	7/1/2017	9/1/2017			62	89	1
The Tower at Washington Square LLC	Liberty Tower - Retail - RPTA 2018	4744-18	2019	10	2028	\$ 292,971		7/1/2017				20		2
McCormick & Company	McCormick & Company - RPTA 2021	4913-21	2025	4	2028	\$ 17,952,000	\$ 10,699,117	7/31/2022		80	112			1
Herstoric Properties, LLC	Monarch Printing Building Building (516 S. Michigan St.) - RPTA 2023	5034-23	Not Started	6		\$ 500,000	\$ 50,000	11/1/2023		0		3		0
Herstoric Properties, LLC	Monarch Printing Building Building (516 S. Michigan St.) - VBD 2023	5035-23	2025	2	2026									1
National Distributions Center, LLC (Bakery Distribution Partners)	National Distributions Center, LLC (5020 N. Dylan Drive) - RPTA 2018	4747-18	2021	9	2029	\$ 17,100,000	\$ 14,854,554	12/3/2019	1/6/2020	108	337	0	0	1

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Ontario Partners, LLC	Ontario Partners, LLC (5435 Dylan Drive) - RPTA 2016	4523-16	2018	10	2027	\$ 7,800,000	\$ 6,864,072	10/31/2016	12/31/2016	83	94	15	55	1
Property Bros LLC	Property Bros LLC (430 Cottage Grove Ave.) - RPTA 2023	5058-23	2025	8	2033	\$ 235,300		7/1/2024		0	0	0	0	1
Property Bros LLC	Property Bros LLC (430 Cottage Grove Ave.) - VBD 2023	5057-23	2025	2	2026									1
Property Bros LLC	Property Bros LLC (542 N. Scott St.) - RPTA 2023	5058-23	2025	8	2033	\$ 277,100		1/31/2024		0	0	0	0	1
Property Bros LLC	Property Bros LLC (542 N. Scott St.) - VBD 2023	5057-23	2025	2	2026									1
Property Bros LLC	Property Bros LLC (616 Sherman Ave.) - RPTA 2023	5058-23	Not Started	8		\$ 417,500		7/1/2024		0	0	0	0	0
Greenleaf Holdco	Pure Green Farms - RPTA 2022	4941-22	Not Started	9		\$ 12,000,000		12/31/2024		25		75		0
Peak Investment and Management LLC	Retail Development (Portage and Elwood) - RPTA 2024	5063-24	Not Started	5		\$ 1,400,000		11/1/2024		0		15		0
The Robert Henry Corporation	Robert Henry (2652 Jaclyn Court) - RPTA 2023	5000-23	Not Started	6		\$ 4,000,000		4/30/2024		210		5		0
The Robert Henry Corporation	Robert Henry (3161 Youngs Court) - RPTA 2023	5000-23	Not Started	6		\$ 2,000,000		12/29/2023		0		0		0
Run Faster Run LLC	Run Faster Run LLC (525 S. Lafayette Blvd.) RPTA 2014	4387-14	2017	8	2024	\$ 1,000,000	\$ 2,573,184	4/1/2015	4/1/2015			3	16	1
3602 Sample Street, LLC	Seaflor (3602 Sample Street) - VBD 2019	4815-19	2023	5	2027	\$ 350,000	\$ 175,000	11/1/2019	11/1/2019	6	1	7	33	1
Federico Armando & Shidler Emily JTW	Single-Family Home - Cross Community Inc. (722 Harrison Ave.) - RPTA 2024	5072-24	2025	5	2029	\$ 220,000	\$ 263,640	12/1/2023	3/25/2024	0	0	0	0	1
Wilmoth Renaldo B	Single-Family Home - Cross Community Inc. (726 Harrison Ave.) - RPTA 2024	5072-24	2025	5	2029	\$ 220,000	\$ 262,875	12/1/2023	3/4/2024	0	0	0	0	1
SoMa Capital LLC	SoMA (536 S. Main Street) - RPTA 2023	5006-23	Not Started	8		\$ 2,065,000		3/31/2024		0		0		0
SBCC RE LLC	South Bend Chocolate Company / Indiana Dinosaur Museum - RPTA 2024	5066-23	2023	6	2029	\$ 6,361,010	\$ 5,798,631	6/30/2021		54		70		2
RealAmerica Development, LLC	Stadium Flats - RPTA 2023	5036-23	Not Started	8		\$ 10,710,500		3/1/2025		0		2		0
RDistrict One LLC	Studebaker Buildings 112 & 113 - RPTA 2015	4514-15	2019	10	2030	\$ 9,446,250	\$ 14,679,034	3/1/2017	5/11/2018	65	168	20	31	1
ND QOZB LLC	The Hill Apartments (511 N. Notre Dame Ave.) - RPTA 2022	4992-22	2024	8	2032	\$ 11,385,000	\$ 12,550,000	7/27/2023	12/15/2023	0	0	8	8	1
The Monreaux LLC	The Monreaux LLC - RPTA 2022	4975-22	Not Started	8		\$ 13,524,560		11/1/2024		0		29		0

Corporation	Project Information	Confirming Resolution Number	Start Pay Year	Years Granted	Expected End Pay Year	Estimated Project Cost	Actual Project Cost	Estimated Completion Date	Actual Completion Date	Announced Retained Jobs	Actual Retained Jobs	Announced New Jobs	Actual New Jobs	Compliance* (0-6)
Toyo Seiko North America Inc.	Toyo Seiko North America Inc. - RPTA 2019	4832-19	2022	6	2027	\$ 1,576,000	\$ 2,101,604	7/1/2021	7/1/2021	4	3	1	3	1
Tri-Pac, Inc.	Tri-Pac, Inc. (3333 N. Kenmore Street) - RPTA 2017	4673-17	2020	7	2026	\$ 1,000,000	\$ 1,187,634	12/31/2019	12/31/2019	7	158	20	20	1
Tri-Pac, Inc.	Tri-Pac, Inc. (4303 Technology Drive) - RPTA 2020	4875-20	2025	7	2031	\$ 1,000,000	\$ 2,957,442	12/31/2021	12/31/2021			20	20	1
Verbio South Bend	Verbio South Bend Ethanol Expansion - RPTA 2023	5026-23	Not Started	8		\$ 11,000,000		12/31/2025		61		8		0
Bakery Group LLC (Hometowne Dev LLC)	Ward Bakery / Bakery Group - RPTA 2021	4909-21	2025	4	2028	\$ 3,750,000	\$ 2,304,689	10/15/2024		0	0			1
Wharf Partners, LLC	Wharf Partners, LLC - RPTA 2018	4714-18	2021	6	2026	\$ 19,350,000	\$ 20,300,000	10/1/2019	12/31/2020			23		2
WSJM-INC	WSJM, Inc. (316 E. Monroe St.) - RPTA 2020	4849-20	2023	5	2027	\$ 3,100,600	\$ 2,777,399	7/31/2021	9/15/2021	23	25			1
WSJM-INC	WSJM, Inc. (316 E. Monroe St.) - VBD 2020	4853-20	2023	5	2027									1

\* Legend/Key for Compliance Scores

(0) *New Abatement*: Not required to file Form CF-1

(1) *Company is in compliance*

Company is in compliance with all goals, including project cost, jobs created and related salaries, and jobs retained and related salaries.

(2) *Company substantially in compliance*

Company fell under one or more of the following: (a) company did not meet one or more goals for its abatement, however, the project is relatively new and other factors have slowed progress; (b) company met their goals in earlier reporting periods and is currently below those goals due to other factors; and/or (c) company's explanation provided in a previous reporting period still applies for the current period or the company failed to meet their estimated project cost. Since abatement is only applied to improvements actually built, the fact that improvements were less than anticipated means the company's abatement benefits were automatically reduced when the abatement deduction was actually calculated. This results in a lower cost to the City for each job created or retained.

(3) *Company substantially out of compliance*

Company has failed significantly to meet one goal related to created jobs and salaries, retained jobs and salaries, and/or the actual cost of their investment.

(4) *Company out of compliance*

Company has failed to meet all goals related to project cost, jobs created and related salaries, and jobs retained and related salaries; or company has been delinquent or in default with respect to any tax payment in St. Joseph County, Indiana, for multiple payment periods.

(5) *Company failed to file Form CF-1*

Company has failed to submit this year's Form CF-1. Staff contacted business multiple attempts after the initial letter, to obtain information. Recommend Common Council consider this business non-compliant.

(6) *Business Closed/Out of Business*: No action required

**Part 2: Personal Property Tax Abatement Summary - 2023**

**21 Active Tax Abatements**

Corporation	Project Information	Confirming Resolution Number	Start Pay Year	Years Granted	Expected End Pay Year	Estimated Project Cost	Actual Project Cost	Estimated Completion Date	Actual Completion Date	Announced Retained Jobs	Actual Retained Jobs	Announced New Jobs	Actual New Jobs	Compliance* (0-6)
Bamar Plastics, Inc.	Bamar Plastics, Inc. - PPTA 2020	4855-20	2022	5	2026	\$ 649,104	\$ 1,081,629	1/31/2022	6/1/2022	14	16	1	2	1
CBK Land Development LLC / Chase Plastics	Chase Plastics - PPTA 2019	4775-19	2022	5	2026	\$ 703,000	\$ 432,466	5/31/2020	5/26/2020	18	18	13	3	2
GFC Holdings, LLC / Claeys Candy	Claeys Candy - PPTA 2021	4892-21	2024	5	2028	\$ 2,400,000	\$ 4,343,478	3/1/2022		30	30	3		2
Crossroads Solar Enterprises LLC	Crossroads Solar Enterprises LLC - PPTA 2023	5047-23	2025	5	2029	\$ 1,000,000	\$ 1,000,000	9/30/2023	11/1/2023	14	14	15	4	2
SWGS Properties, LLC / Grace Steel, LLC	Grace Steel (2920 W. Sample) - PPTA 2019	4768-19	2021	5	2025	\$ 700,000	\$ 702,941	12/31/2020	12/31/2021	0	0	10	10	1
Imagineering Enterprises, Inc.	Imagineering Enterprises, Inc. (3722 Foundaton Ct.) - PPTA 2018	4740-18	2022	5	2026	\$ 3,000,000	\$ 464,659	4/1/2017	9/13/2019	135	41	5	70	1
Imagineering Enterprises, Inc.	Imagineering Enterprises, Inc. (3722 Foundaton Ct.) - PPTA 2023	5056-23	Not Started	5		\$ 2,631,500		12/29/2023		45		10		0
JEM Farms South Bend, LLC	JEM Farms South Bend - PPTA 2022	4943-22	Not Started	5		\$ 118,200,000		12/31/2026				110		6
Kruger Holdings, LLC	Kruger Holdings (5681 Cleveland Road) - PPTA 2019	4817-19	2022	5	2026	\$ 4,000,000	\$ 509,845	12/31/2020	9/30/2022	90				6
Masterbilt, Incorporated	Masterbilt - PPTA 2017	4671-17	2019	5	2023	\$ 575,000	\$ 568,680	10/13/2019	7/26/2019	10	47	2	10	1
McCormick & Company	McCormick & Company - PPTA 2021	4915-21	2025	5	2029	\$ 23,765,895	\$ 14,757,314	4/30/2023		80	112			2
Molding Products, LLC	Molding Products, LLC (1545 S. Olive) - PPTA 2019	4773-19	2021	5	2025	\$ 5,500,000	\$ 5,000,000	12/31/2019	7/31/2020	45	68	20	9	1
Mossberg & Company, Inc.	Mossberg & Company, Inc. - PPTA 2021	4897-21	2024	5	2028	\$ 2,870,000	\$ 2,365,414	6/1/2021	11/12/2021	73	76	0	0	1
Greenleaf Holdco	Pure Green Farms - PPTA 2022	4945-22	Not Started	5		\$ 70,030,000		12/31/2024		25		75		0
Royal Adhesives & Sealants, LLC	Royal Adhesives & Sealants, LLC (1915 N. Bendix) - PPTA 2021	4886-21	2023	5	2027	\$ 1,380,875	\$ 1,380,875	4/5/2021	7/7/2021	201		6		2
Steel Warehouse Company LLC	Steel Warehouse Company - PPTA 2022	4982-22	Not Started	5		\$ 3,697,000		7/1/2023		21		10		0

Corporation	Project Information	Confirming Resolution Number	Start Pay Year	Years Granted	Expected End Pay Year	Estimated Project Cost	Actual Project Cost	Estimated Completion Date	Actual Completion Date	Announced Retained Jobs	Actual Retained Jobs	Announced New Jobs	Actual New Jobs	Compliance* (0-6)
Toyo Seiko North America Inc.	Toyo Seiko North America Inc. - PPTA 2022	4964-22	2024	5	2029	\$ 1,050,000	\$ 120,516	4/30/2021	12/9/2024	4	3	1	3	2
Tri-Pac, Inc.	Tri-Pac, Inc. (3333 N. Kenmore Street) - PPTA 2017	4677-17	2020	5	2024	\$ 1,500,000	\$ 384,806	12/31/2019	12/31/2019	7	158	20	20	2
Tri-Pac, Inc.	Tri-Pac, Inc. (4303 Technology Drive) - PPTA 2020	4873-20	2022	5	2026	\$ 2,000,000	\$ 4,488,160	12/31/2021	12/31/2021		158	20	20	1
Verbio South Bend	Verbio South Bend Ethanol Expansion - PPTA 2023	5025-23	Not Started	5		\$ 226,500,000		12/31/2023		61		8		0
WSJM-INC	WSJM, Inc. (316 E. Monroe St.) - PPTA 2020	4851-20	2023	5	2027	\$ 650,000	\$ 720,322	7/31/2021	9/15/2021	23	23	3	7	1

\* Legend/Key for Compliance Scores

(0) *New Abatement* : Not required to file Form CF-1

(1) *Company is in compliance*

Company is in compliance with all goals, including project cost, jobs created and related salaries, and jobs retained and related salaries.

(2) *Company substantially in compliance*

Company fell under one or more of the following: (a) company did not meet one or more goals for its abatement, however, the project is relatively new and other factors have slowed progress; (b) company met their goals in earlier reporting periods and is currently below those goals due to other factors; and/or (c) company's explanation provided in a previous reporting period still applies for the current period or the company failed to meet their estimated project cost. Since abatement is only applied to improvements actually built, the fact that improvements were less than anticipated means the company's abatement benefits were automatically reduced when the abatement deduction was actually calculated. This results in a lower cost to the City for each job created or retained.

(3) *Company substantially out of compliance*

Company has failed significantly to meet one goal related to created jobs and salaries, retained jobs and salaries, and/or the actual cost of their investment.

(4) *Company out of compliance*

Company has failed to meet all goals related to project cost, jobs created and related salaries, and jobs retained and related salaries; or company has been delinquent or in default with respect to any tax payment in St. Joseph County, Indiana, for multiple payment periods.

(5) *Company failed to file Form CF-1*

Company has failed to submit this year's Form CF-1. Staff contacted business multiple attempts after the initial letter, to obtain information. Recommend Common Council consider this business non-compliant.

(6) *Business Closed/Out of Business* : No action required



### Part 3: Local Companies/Minority Contractors & Minority Employees - 2023

Owner	Project Name	Number of Minorities Employed	Minority/Local Contractors
1173 South Bend DST	Catalyst Three (1173 Ignition Drive) - RPTA 2019	0	Majority Builders
3602 Sample Street, LLC	Seaflo (3602 Sample Street) - VBD 2019	30	1st Rate Construction, DG Electric, Joseph Cataldo Masonry, Kropp Fire Protection Inc., Koorsen Fire & Security
4018 South Bend LLC	6701 Nimitz Parkway - RPTA 2019	0	Holladay Construction Group
Bakery Group LLC (Hometowne Dev LLC)	Ward Bakery / Bakery Group - RPTA 2021	0	B&B Roofing & Construction, B&M Builders, C&S Masonry, Dominiack Plumbing & Mechanical, ELF Excavating, Evans Metal, Goff Heating, HG Christman, Kil Architecture/Planning, Kropp Fire, Lechlitrner Door, Lincoln Plumbing & Drain Cleaning, Mikes Welding & Fabrication, Neizgodski Plumbing, PWI, Schrock Masonry & Insulation, Weaver Electric & Heating Corp
Bald Mountain LLC	Bald Mountain, LLC (213-217 S. Main Street) - RPTA 2017	8	Weigand Construction Co., INC.
Bamar Plastics, Inc.	Bamar Plastics, Inc. - PPTA 2020	0	Michiana Multi-Craft
CBK Land Development LLC / Chase Plastics	Chase Plastics - PPTA 2019	0	Majority Builders, Inc.
	CBK Land Development LLC (Chase Plastics) - RPTA 2014		
	CBK Land Development LLC (Chase Plastics Addition) - RPTA 2019		
Colfax Hill Partners, LLC	Colfax Hill Partners (525 E. Colfax) - RPTA 2014	0	Century Builders, Inc., Abonmarche Consultants of Indiana, Grad-Rite Excavating, Yoder Concrete, Michiana Waterproofing, SLR Plumbing, Four Winds Heating and Cooling, Wertz Supply
Commerce Center Development, LLC	Commerce Center (300 E. LaSalle) - RPTA 2017	0	Pro Paint, Make Room Design, Dave Dallas Commercial Cleaning, DMTM Inc, FA Wilhelm Construction, Hahn Janitorial, Stephanie Coleman
Crossroads Solar Enterprises LLC	Crossroads Solar Enterprises LLC - PPTA 2023	23	N/A
David A Nufer LLC	Burtons Laundry (521 N. William St.) - RPTA 2023		
Delta Management Company, LLC	Delta Management Company (4755 Ameritech Drive) - RPTA 2021		Midstates Construction, Inc.
Five Corners LLC	Five Corners LLC (1130 South Bend Ave.) - RPTA 2019	8	Horizon Construction Group, Los Angeles Care
GFC Holdings, LLC / Claeys Candy	Claeys Candy - PPTA 2021	4	List on file.
	Claeys Candy (Nimitz Parkway) - RPTA 2021		
GLC Portage Prairie II, LLC	GLC Portage Prairie II - RPTA 2017	19	Majority Builders
GLC Portage Prairie IV, LLC	GLC Portage Prairie IV - RPTA 2019	0	Majority Builders
GLC Portage Prairie V, LLC	GLC Portage Prairie V - RPTA 2022	0	Majority Builders
GLC Portage Prairie, LLC	AM General - Portage Prairie - RPTA 2023	10	Majority Builders
	GLC Portage Prairie - RPTA 2015		

Owner	Project Name	Number of Minorities Employed	Minority/Local Contractors
Herstoric Properties, LLC	Monarch Printing Building Building (516 S. Michigan St.) - VBD 2023	3	Herstoric Construction, Hartford Glass, South Bend TradeWorks
Hibberd Development, LLC	Hibberd Development - RPTA 2017	7	Majority Builders
Hoffman Hotel Apartments Housing Partnership, LP	Hoffman Hotel Apartments (120 W. LaSalle) - RPTA 2013	2	D.C. Construction, JJ amco
Hopkins Properties of South Bend, LLC	Hopkins Properties of South Bend (4373 Ameritech Drive) - RPTA 2019	3	Ritschard Bros, Rieth-Riley Construction, Universal Services, Tri-Valley Glass, Industrial Door of N. Indiana, Fourmen Interiors, Infinium Floors
Imagineering Enterprises, Inc.	Imagineering Enterprises, Inc. (3722 Foundaton Ct.) - PPTA 2018	1	South Bend Metal Products, Norman Perry Trophies Inc, Plastic Fabrication & Dist
	Imagineering Enterprises, Inc. (3722 Foundaton Ct.) - RPTA 2018		
JMS Development, LLC	Historic JMS Building - RPTA 2015	1	HGR Construction, Inc.
JSK Development, Inc. / DTC Hospitality, LLC	JSK Development, Inc. (Southhold LLC; Downtown Hotel) - RPTA 2015	29	Majority Builders
JSK Development, Inc. / Ireland Hospitality, LLC	JSK Development, Inc. (Ireland Hospitality; Southside Hotel) - RPTA 2015	15	Ancon Construction
Kruger Holdings, LLC	Kruger Holdings (5681 Cleveland Road) - PPTA 2019	0	Advance Property Management, Kabelin Ace Hardware, Bamar Plastics, KSS Enterprises, Mid-State Bolt & Screw, PSI Mold Plastics, Elwood Staffing, Linde Gas & Equipment, American Safety & First Aid, Burkhart Sign Sytems, Bob Miller Appliances, Holladay Construction Group, Hoosier Crane, Cressy Commercial Real Estate, Dynamic Mechanical, Niezgodski Plumbing, Gobel Commercial, Overhead Door
LaSalle Partners RA LLC	LaSalle Apartments - RPTA 2016	3	Dylan Kimbrell, Pierce Electric, Anthony Anderson corporation
Masterbilt, Incorporated	Masterbilt - PPTA 2017	5	Clover Machinery Movers, Clover Electric, Progressive Networks, South Bend Roofing
McCormick & Company	McCormick & Company - PPTA 2021	53	List on file.
	McCormick & Company - RPTA 2021		
Molding Products, LLC	Molding Products, LLC (1545 S. Olive) - PPTA 2019	10	FE Moran, Koontz, Navarre, Martell, Zimmerman, Wefab, Michiana Contracting, Safety Kleen, Ancon, Richards Bros.
Mossberg & Company, Inc.	Mossberg & Company, Inc. - PPTA 2021	0	Herrman & Goetz Inc., Craig Electric Inc.
National Distributions Center, LLC (Bakery Distribution Partners)	National Distributions Center, LLC (5020 N. Dylan Drive) - RPTA 2018	140	Tri-Valley Glass Co. Inc., Schuell Fence Co. Inc., Midwest Painting Co., Rieth-Riley Constr. Co., Strescore Inc.
ND QOZB LLC	The Hill Apartments (511 N. Notre Dame Ave.) - RPTA 2022	0	Shive-Hattery Architects, Majority Builders, Cost Cloud Networks
Nilkanth Properties, LLC	Dairy Queen (4836 W. Western Ave.) - RPTA 2018	40	Keystone Masonry, Rose Brick, Milmar Framing, Trout Glass & Mirror, Midwest Tile, 2C Construction, Pro Pain and Finish LLC, Four Seasons Heating, Cooling and Refrigerator
Ontario Partners, LLC	Ontario Partners, LLC (5435 Dylan Drive) - RPTA 2016	44	Holladay Construction Group

Owner	Project Name	Number of Minorities Employed	Minority/Local Contractors
Property Bros LLC	Property Bros LLC (430 Cottage Grove Ave.) - RPTA 2023	5	Property Bros LLC, TRCC LLC
	Property Bros LLC (430 Cottage Grove Ave.) - VBD 2023		
	Property Bros LLC (542 N. Scott St.) - RPTA 2023		
	Property Bros LLC (542 N. Scott St.) - VBD 2023		
RDistrict One LLC	Studebaker Buildings 112 & 113 - RPTA 2015	57	Avanti Group LLC, Christman Construction LLC, DA Dodd, JEM Concrete Drilling & Sawing, Jones Petrie Rafinski, Koontz Wagner Construction Services LLC, Precision Wall Systems, Summit Contractor Supply Inc
Royal Adhesives & Sealants, LLC	Royal Adhesives & Sealants, LLC (1915 N. Bendix) - PPTA 2021		
Run Faster Run LLC	Run Faster Run LLC (525 S. Lafayette Blvd.) - RPTA 2014	12	Ancon Construction Co., Inc., Martell Electric LLC, Southwind Flooring, Inc., Burkhart Advertising, Inc., Klink Trucking, Underground Pipe & Valve, LeMaster Steel Erectors, Dynamic Mechanical, Industrial Door, VFP Fire Systems
SBCC RE LLC	South Bend Chocolate Company / Indiana Dinosaur Museum - RPTA 2024		HGR Group Inc.
SWGS Properties, LLC / Grace Steel, LLC	Grace Steel (2920 W. Sample) - PPTA 2019	20	Koontz Wagner, Final Phase Electric, Smith Concrete, Fulcrum Rigging, Copper Hill, All Phase, BSR Roofmasters, D.A. Dodd, Hoosier Tool, Industrial Door.
	Grace Steel (2920 W. Sample) - RPTA 2019		
The Tower at Washington Square LLC	Liberty Tower - Apartments - RPTA 2018	56	D&B Plumbing, Martell Electric, Christman Construction, Environmental Glass, Inc.
	Liberty Tower - Hotel - RPTA 2018		
	Liberty Tower - Garage - RPTA 2018		
	Liberty Tower - Retail - RPTA 2018		
Toyo Seiko North America Inc.	Toyo Seiko North America Inc. - PPTA 2022	0	Cadet Construction
	Toyo Seiko North America Inc. - RPTA 2019		
Tri-Pac, Inc.	Tri-Pac, Inc. (3333 N. Kenmore Street) - PPTA 2017	68	List on file.
	Tri-Pac, Inc. (4303 Technology Drive) - PPTA 2020		
	Tri-Pac, Inc. (3333 N. Kenmore Street) - RPTA 2017		
	Tri-Pac, Inc. (4303 Technology Drive) - RPTA 2020		
Wharf Partners, LLC	Wharf Partners, LLC - RPTA 2018	1	Martell Electric, Panzica Building Corp., North Central Mechanical Inc., Rosema, Foegley Landscaping, Ritschard Brothers, Midland Engineering, Wertz Hardware
WSJM-INC	WSJM, Inc. (316 E. Monroe St.) - PPTA 2020	0	Arnt Asphalt, Moss Building Products, Dudeck Roofing & Sheet Metal, LUE Manufacturing, Crane Industrial Services, Mid-sates Elevator, HG Christman Construction, ORP Fire Protection, Heigeson Steel, Solid Rock Masonry, Herman & Goetz, Superior Flooring, La Force Door, Wertz Supply and Glazing
	WSJM, Inc. (316 E. Monroe St.) - RPTA 2020		
	WSJM, Inc. (316 E. Monroe St.) - VBD 2020		

**Part 4: New Tax Abatements Confirmed by the Common Council - 2023**

**25 Active Tax Abatements**

Real Property															
Project	Petition Filing Date	Confirming Resolution Date	Confirming Resolution Number	Years Granted	Estimated Total Project Cost	Pre-Abatement Assessed Value	Estimated Annual Taxes w/o Improvement	Estimated Assessed Value (Abatement Yr 1)	Cumulative Estimated Taxes Abated	Cumulative Estimated Taxes Paid	Announced Retained Jobs	Announced New Jobs	Payroll Increase	Square Footage Increase	Number of New Housing Units
SoMA (536 S. Main Street)	2/21/2023	3/13/2023	5006-23	8	\$ 2,065,000	\$ 213,900	\$ 5,133	\$ 1,785,900	\$ 213,157	\$ 129,693	0	0	\$ -	0	12
Robert Henry (2652 Jaclyn Court)	3/7/2023	3/27/2023	5000-23	6	\$ 4,000,000	\$ 13,200	\$ 449	\$ 3,213,200	\$ 416,427	\$ 239,008	210	5	\$ 550,000	23,000	N/A
Robert Henry (3161 Youngs Court)	3/7/2023	3/27/2023	5000-23	6	\$ 2,000,000	\$ 11,300	\$ 384	\$ 1,611,300	\$ 599,305	\$ 341,318	0	0	\$ -	10,000	N/A
Liberty Tower - Apartments & Outdoor Space	3/21/2023	4/10/2023	5014-23	8	\$ 14,700,000	\$ 1,494,200	\$ 43,327	\$ 12,694,200	\$ 1,287,128	\$ 1,344,022	0	9	\$ 324,000	0	90
Single-Family Home - Cross Community Inc. (722 Harrison Ave.)	3/30/2023	3/25/2024	5072-24	5	\$ 220,000	\$ 4,000	\$ 105	\$ 180,000	\$ 8,989	\$ 1,663	0	0	\$ -	1,600	1
Single-Family Home - Cross Community Inc. (726 Harrison Ave.)	3/30/2023	3/25/2024	5072-24	5	\$ 220,000	\$ 4,000	\$ 105	\$ 180,000	\$ 8,989	\$ 1,663	0	0	\$ -	1,600	1
Verbio South Bend Ethanol Expansion	5/1/2023	6/12/2023	5026-23	8	\$ 11,000,000	\$ 4,431,400	\$ 150,654	\$ 13,231,400	\$ 788,392	\$ 2,810,232	61	8	\$ 800,000	60,000	N/A
Burtons Laundry (521 N. William St.)	5/10/2023	6/12/2023	5027-23	4	\$ 1,600,000	\$ 4,600	\$ 7,394	\$ 1,284,600	\$ 136,442	\$ 38,248	4	0	\$ -	6,300	N/A
Diamond View Apartments (Affordable Multi-Family)	6/5/2023	6/12/2023	5023-23	8	\$ 9,885,500	\$ 32,100	\$ 1,091	\$ 1,693,050	\$ 156,217	\$ 168,808	0	2	\$ 85,000	80,000	60
AM General - Portage Prairie	6/5/2023	6/26/2023	5033-23	9	\$ 12,000,000	\$ 7,990,900	\$ 257,275	\$ 17,590,900	\$ 648,961	\$ 4,733,380	76	15	\$ 600,000	167,630	N/A
Monarch Printing Building Building (516 S. Michigan St.)	6/5/2023	6/26/2023	5034-23	6	\$ 500,000	\$ 42,600	\$ 1,448	\$ 442,600	\$ 42,900	\$ 41,382	0	3	\$ 210,000	0	6
Monarch Printing Building Building (516 S. Michigan St.)	6/5/2023	6/26/2023	5035-23	2		\$ -			\$ 1,416	\$ 1,481					
Stadium Flats	6/5/2023	6/26/2023	5036-23	8	\$ 10,710,500	\$ 23,800	\$ 809	\$ 2,665,800	\$ 302,475	\$ 262,610	0	2	\$ 85,000	80,000	60
Retail Development (Portage and Elwood)	6/13/2023	1/8/2024	5063-24	5	\$ 1,400,000	\$ 93,700	\$ 3,186	\$ 1,172,200	\$ 124,900	\$ 72,300	0	15	\$ 480,000	10,300	N/A
KCG (LIHTC Project)	6/20/2023	7/10/2023	5038-23	10	\$ 12,323,616	\$ 10,800	\$ 367	\$ 483,417	\$ 237,996	\$ 30,774	0	1	\$ 40,000	50,500	50

Project	Petition Filing Date	Confirming Resolution Date	Confirming Resolution Number	Years Granted	Estimated Total Project Cost	Pre-Abatement Assessed Value	Estimated Annual Taxes w/o Improvement	Estimated Assessed Value (Abatement Yr 1)	Cumulative Estimated Taxes Abated	Cumulative Estimated Taxes Paid	Announced Retained Jobs	Announced New Jobs	Payroll Increase	Square Footage Increase	Number of New Housing Units
Advantix Affordable Scattered Site Development	6/21/2023	7/10/2023	5041-23	10	\$ 14,000,000	\$ 203,600	\$ 6,922	\$ 2,495,238	\$ 401,037	\$ 197,745	0	2	\$ 83,200	64,000	50
5 Corners (1144 Corby Blvd.)	6/30/2023	7/24/2023	5046-23	10	\$ 24,500,000	\$ 376,700	\$ 9,822	\$ 19,760,500	\$ 1,526,100	\$ 3,336,800	0	9	\$ 570,600	173,000	108
Property Bros LLC (430 Cottage Grove Ave.)	9/20/2023	10/9/2023	5058-23	8	\$ 235,300	\$ 54,200	\$ 1,267	\$ 242,440	\$ 22,707	\$ 23,836	0	0	\$ -	0	2
Property Bros LLC (430 Cottage Grove Ave.)	9/20/2023	10/9/2023	5057-23	2		\$ -			\$ 963	\$ 1,638					
Property Bros LLC (542 N. Scott St.)	9/20/2023	10/9/2023	5058-23	8	\$ 277,100	\$ 59,200	\$ 1,421	\$ 280,880	\$ 27,653	\$ 26,269	0	0	\$ -	0	4
Property Bros LLC (542 N. Scott St.)	9/20/2023	10/9/2023	5057-23	2		\$ -			\$ 1,043	\$ 1,799					
Property Bros LLC (616 Sherman Ave.)	9/20/2023	10/9/2023	5058-23	8	\$ 417,500	\$ 9,800	\$ 333	\$ 343,800	\$ 57,315	\$ 8,687	0	0	\$ -	1,760	2
					<b>\$ 122,054,516</b>	<b>\$ 15,074,000</b>	<b>\$ 491,493</b>	<b>\$ 81,351,425</b>	<b>\$ 7,010,512</b>	<b>\$ 13,813,355</b>	<b>351</b>	<b>71</b>	<b>\$ 3,827,800</b>	<b>729,690</b>	<b>446</b>
					Current Avg. Annual Taxes:		\$ 25,868	Avg. Annual Taxes w/ Abatement:		\$ 94,612			Min. Affordable Units:		173

Personal Property															
Petitioner	Petition Filing Date	Confirming Resolution Date	Confirming Resolution Number	Years Granted	Estimated Total Project Cost	Pre-Abatement Assessed Value	Estimated Annual Taxes w/o Improvement	Estimated Assessed Value (Abatement Yr 1)	Cumulative Estimated Taxes Abated	Cumulative Estimated Taxes Paid	Announced Retained Jobs	Announced New Jobs	Payroll Increase	Square Footage Increase	Number of New Housing Units
Crossroads Solar Enterprises LLC	5/1/2023	7/24/2023	5047-23	5	\$ 1,000,000	\$ -	\$ -	\$ -	\$ 68,651	\$ 11,922	14	15	\$ 750,000	0	N/A
Verbio South Bend Ethanol Expansion	5/1/2023	6/12/2023	5025-23	5	\$ 226,500,000	\$ -	\$ -	\$ -	\$ 15,763,423	\$ 3,504,887	See above	See above	See above	See above	N/A
Imagineering Enterprises, Inc. (3722 Foundaton Ct.)	9/6/2023	9/25/2023	5056-23	5	\$ 2,631,500	\$ -	\$ -	\$ -	\$ 127,574	\$ 45,984	45	10	\$ 427,600	0	N/A
					<b>\$ 230,131,500</b>	<b>\$ -</b>	<b>\$ -</b>		<b>\$ 15,959,648</b>	<b>\$ 3,562,793</b>	<b>59</b>	<b>25</b>	<b>\$ 1,177,600</b>	<b>0</b>	
							Avg. Annual Taxes w/ Abatement:		\$ 237,520						

<b>Grand Total:</b>					<b>\$ 352,186,016</b>	<b>\$ 15,074,000</b>	<b>\$ 491,493</b>	<b>\$ 81,351,425</b>	<b>\$ 22,970,160</b>	<b>\$ 17,376,148</b>	<b>410</b>	<b>96</b>	<b>\$ 5,005,400</b>	<b>729,690</b>	<b>446</b>
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