



# OFFICE OF THE CITY CLERK

## BIANCA L. TIRADO, CITY CLERK

### MEMORANDUM

**TO:** MEMBERS OF THE COMMON COUNCIL  
**FROM:** BIANCA L. TIRADO, CITY CLERK  
**DATE:** THURSDAY, JANUARY 9, 2025  
**SUBJECT:** COMMITTEE MEETING NOTICE

The following Common Council Committee Meetings have been scheduled for **Monday, January 13, 2025:**

Council Chambers  
4<sup>th</sup> Floor County-City Building  
227 W. Jefferson Blvd.  
South Bend, IN 46601

The Council Chambers will be Open to the Public. Members of the Public may Attend this Meeting Virtually via Microsoft Teams Meeting app here: <https://tinyurl.com/011325CC>

- 4:15 P.M.**      **HEALTH & PUBLIC SAFETY**      **CHAIRPERSON, TOMAS MORGAN**
1. [Bill No. 74-24](#) - Ordinance Establishing a Merit Board System Governing the South Bend Fire Department (*Substitute*)
- 4:30 P.M.**      **COMMUNITY INVESTMENT**      **CHAIRPERSON, WARNER**
1. [Bill No. 25-01](#) - Designating Resolution - Real Property Tax Abatement 225 South Michigan Street and 229 South Michigan Street
  2. [Bill No. 25-02](#) - Reconfirming Resolution - Real Property Tax Abatement 3820 West Calvert Street
  3. [Bill No. 25-03](#) - Reconfirming Resolution - Personal Property Tax Abatement 3820 West Calvert Street
- 5:00 P.M.**      **ZONING & ANNEXATION**      **CHAIRPERSON, DR. DAVIS**
1. [Bill No. 63-24](#) - Annexation of Land South of Lafayette Falls Phase One Annexation Area and West of South US-31 Highway (*Public Hearing Only*)

Council President Canneth Lee has called an **Informal Meeting** of the Council which will commence immediately after the adjournment of the Community Investment Committee Meeting.

### **INFORMAL MEETING OF THE COMMON COUNCIL**

**PRESIDENT, LEE**

INTEGRITY | SERVICE | ACCESSIBILITY

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

Matthew Neal  
DEPUTY CITY CLERK / DIRECTOR OF POLICY

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.southbend.in.gov](http://www.southbend.in.gov)



## CITY OF SOUTH BEND | OFFICE OF THE CITY CLERK

1. Discussion of Council Agenda
2. Update and Announcements
3. Adjournment

cc: Mayor James Mueller  
Committee Meeting List  
Media

**NOTICE FOR HEARING AND SIGHT IMPAIRED PERSONS**  
Auxiliary Aid or Other Services may be Available upon Request at No Charge.  
Please give Reasonable Advance Request when Possible



## **SOUTH BEND COMMON COUNCIL**

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### **MEETING AGENDA**

Monday, January 13, 2025  
7:00 P.M.

The South Bend Common Council meeting will be open to the public at the Council Chambers on the 4<sup>th</sup> floor of the County-City Building, 227 W. Jefferson Blvd., South Bend, IN 46601

or available by way of a virtual meeting using the Microsoft Teams Meeting App. Public access to the meeting can be granted by this Microsoft Teams Link:

<https://tinyurl.com/SBCC011325>

1. **INVOCATION**
2. **PLEDGE TO THE FLAG**
3. **ROLL CALL**
4. **REPORT FROM THE SUB-COMMITTEE ON MINUTES**

DECEMBER 9, 2024

JANUARY 6, 2025 (ORGANIZATIONAL MEETING)

5. **SPECIAL BUSINESS**
6. **REPORTS FROM CITY OFFICES**
7. **COMMITTEE OF THE WHOLE**

**TIME:** \_\_\_\_\_

BILL NO.

**63-24 PUBLIC HEARING ON AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA, ANNEXING TO AND BRINGING WITHIN THE CITY LIMITS OF SOUTH BEND, INDIANA, CERTAIN LAND LOCATED IN CENTRE TOWNSHIP, CONTIGUOUS THEREWITH; COUNCILMANIC DISTRICT NO. 5, FOR LAND SOUTH OF LAFAYETTE FALLS PHASE I ANNEXATION AREA AND WEST OF SOUTH US-31 HIGHWAY, SOUTH BEND, INDIANA (PUBLIC HEARING ONLY)**

[74-24](#) PUBLIC HEARING ON AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA, ESTABLISHING A MERIT BOARD SYSTEM GOVERNING THE SOUTH BEND FIRE DEPARTMENT (SUBSTITUTE)

8. **BILLS ON THIRD READING**  
BILL NO.

TIME: \_\_\_\_\_

[74-24](#) THIRD READING ON AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA, ESTABLISHING A MERIT BOARD SYSTEM GOVERNING THE SOUTH BEND FIRE DEPARTMENT (SUBSTITUTE)

9. **RESOLUTIONS**  
BILL NO.

[25-01](#) A RESOLUTION OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND DESIGNATING CERTAIN AREAS WITHIN THE CITY OF SOUTH BEND, INDIANA, COMMONLY KNOWN AS 225 SOUTH MICHIGAN, SOUTH BEND, INDIANA 46601 AND 229 SOUTH MICHIGAN, SOUTH BEND, INDIANA 46601 AN ECONOMIC REVITALIZATION AREA FOR PURPOSES OF AN EIGHT-YEAR (8) REAL PROPERTY TAX ABATEMENT FOR RSPG GLOBAL CONSULTING LLC

[25-02](#) A RESOLUTION MODIFYING AND RECONFIRMING THE ADOPTION OF DECLARATORY RESOLUTION NO. 4939-22 DESIGNATING CERTAIN AREAS WITHIN THE CITY OF SOUTH BEND, INDIANA, COMMONLY KNOWN AS 3820 WEST CALVERT STREET, SOUTH BEND, IN 46613 AN ECONOMIC REVITALIZATION AREA FOR PURPOSES OF A NINE-YEAR (9) REAL PROPERTY TAX ABATEMENT FOR GREENLEAF HOLDCO LLC

[25-03](#) A RESOLUTION MODIFYING AND RECONFIRMING THE ADOPTION OF DECLARATORY RESOLUTION NO. 4944-22 DESIGNATING CERTAIN AREAS WITHIN THE CITY OF SOUTH BEND, INDIANA, COMMONLY KNOWN AS 3820 WEST CALVERT STREET, SOUTH BEND, IN 46613 AN ECONOMIC REVITALIZATION AREA FOR PURPOSES OF A FIVE-YEAR (5) PERSONAL PROPERTY TAX ABATEMENT FOR GREENLEAF HOLDCO LLC

10. **BILLS ON FIRST READING**  
BILL NO.

[01-25](#) FIRST READING ON AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA, AMENDING THE ZONING ORDINANCE FOR PROPERTY LOCATED AT 1408 ELWOOD AVENUE,

COUNCILMANIC DISTRICT NO. 2 IN THE CITY OF SOUTH BEND,  
INDIANA

02-25 FIRST READING ON AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA, AMENDING THE ZONING ORDINANCE FOR PROPERTY LOCATED AT 616 SHERMAN AVENUE, COUNCILMANIC DISTRICT NO. 1 IN THE CITY OF SOUTH BEND, INDIANA

03-25 FIRST READING ON AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA, AMENDING THE ZONING ORDINANCE AND SEEKING A USE VARIANCE FOR PROPERTY LOCATED AT 4022 OLD CLEVELAND ROAD, COUNCILMANIC DISTRICT NO. 1 IN THE CITY OF SOUTH BEND, INDIANA

04-25 FIRST READING ON AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA, ADOPTING AN INVESTMENT POLICY FOR THE CITY OF SOUTH BEND FOR CALENDAR YEAR 2025 THROUGH 2028

11. UNFINISHED BUSINESS

12. NEW BUSINESS

13. PRIVILEGE OF THE FLOOR

14. ADJOURNMENT

TIME: \_\_\_\_\_

**Notice for Hearing and Sight Impaired Persons**  
**Auxiliary Aid Or Other Services Are Available Upon Request At No Charge.**  
**Please Give Reasonable Advance Request When Possible.**

*In the interest of providing greater public access and to promote greater transparency, the South Bend Common Council agenda has been translated into Spanish. All agendas are available online from the Council's website, and also in paper format in the Office of the City Clerk, 4<sup>th</sup> Floor County-City Building. Reasonable efforts have been taken to provide an accurate translation of the text of the agenda, however, the officiate is the English version. Any discrepancies which may be created in the translation are not binding. Such translations do not create any right or benefit, substantive or procedural, enforceable at law or equity by a party against the Common Council or the City of South Bend, Indiana.*





## 2025 COMMON COUNCIL STANDING COMMITTEES (Rev. 01-09-2025)

### COMMUNITY INVESTMENT COMMITTEE

Oversees the various activities of the Department of Community Investment. This Committee reviews all real and personal tax abatement requests and works closely with the Business Development Team.

Troy Warner, Chairperson

Karen L. White, Vice-Chairperson

Ophelia Gooden-Rodgers., Member

Sherry Bolden-Simpson, Member

*Citizen Member*

*Citizen Member*

### COMMUNITY RELATIONS COMMITTEE

Oversees the various activities of the Engagement and Economic Empowerment, Neighborhood Development, and Community Resources Teams within the City's Department of CI and is charged with facilitating partnerships and ongoing communications with other public and private entities operating within the City.

Ophelia Gooden-Rodgers, Chairperson

Karen L. White, Vice-Chairperson

*Citizen Member*

Sheila Niezgodski, Member

Sherry Bolden-Simpson, Member

### COUNCIL RULES COMMITTEE

Oversees the regulations governing the overall operation of the Common Council, as well as all matters of public trust. Its duties are set forth in detail in Section 2-10.1 of the *South Bend Municipal Code*.

Canneth Lee, Member

Rachel Tomas Morgan, Member

Troy Warner, Member

### HEALTH AND PUBLIC SAFETY COMMITTEE

Oversees the various activities performed by the Fire and Police Departments, EMS, Department of Code Enforcement, ordinance violations, and related health and public safety matters.

Rachel Tomas Morgan, Chairperson

Troy Warner, Vice-Chairperson

Sheila Niezgodski, Member

Sharon McBride, Member

*Citizen Member*

*Citizen Member*

### INFORMATION AND TECHNOLOGY COMMITTEE- Innovation

Oversees the various activities of the City's Department of Innovation, which includes the Divisions of Information Technology and 311 so that the City of South Bend remains competitive and on the cutting edge of developments in this area. Reviewing and proposing upgrades to computer systems and web sites, developing availability and access to GIS data and related technologies are just some of its many activities.

Rachel Tomas Morgan, Chairperson

Sherry Bolden-Simpson, Vice-Chairperson

Dr. Oliver Davis, Member

*Citizen Member*

*Citizen Member*

### PARC COMMITTEE- Venues Parks and Arts (Parks, Recreation, Cultural Arts & Entertainment)

Oversees the various activities of the Century Center, College Football Hall of Fame, Four Winds Stadium, Morris Performing Arts Center, Studebaker National Museum, South Bend Regional Museum of Art, Potawatomi Zoo, My SB Trails, DTSB relations, and the many recreational and leisure activities offered by the Department of Venues Parks and Arts.

Sharon L. McBride, Chairperson

Karen L. White, Vice- Chairperson

*Citizen Member*

Ophelia Gooden-Rogers, Member

Troy Warner, Member



### **PERSONNEL AND FINANCE COMMITTEE**

Oversees the activities performed by the Department of Administration and Finance, and reviews all proposed salaries, budgets, appropriations, and other fiscal matters, as well as personnel policies, health benefits and related matters.

Sheila Niezgodski, Chairperson  
Karen L. White, Vice-Chairperson  
Rachel Tomas Morgan, Member

Dr. Oliver Davis, Member  
*Citizen Member*  
*Citizen Member*

### **PUBLIC WORKS AND PROPERTY VACATION COMMITTEE**

Oversees the various activities performed by the Building Department, the Department of Public Works and related public works and property vacation issues.

Sheila Niezgodski, Chairperson  
Ophelia Gooden-Rodgers, Vice-Chairperson  
Citizen Member

Dr. Oliver Davis, Member  
Troy Warner, Member  
*Citizen Member*

### **RESIDENTIAL NEIGHBORHOODS COMMITTEE**

Oversees the various activities and issues related to neighborhood development and enhancement.

Karen L. White, Chairperson  
Sheila Niezgodski, Vice-Chairperson  
*Citizen Member*

Ophelia Gooden-Rodgers, Member  
Sharon McBride, Member  
*Citizen Member*

### **UTILITIES COMMITTEE**

Oversees the activities of all enterprise entities including but not limited to the Bureau of Waterworks, Bureau of Sewers, and all related matters.

Sherry Bolden-Simpson, Chairperson  
Dr. Oliver Davis, Vice-Chairperson  
*Citizen Member*

Sheila Niezgodski, Member  
Ophelia Gooden-Rodgers, Member  
*Citizen Member*

### **ZONING AND ANNEXATION COMMITTEE**

Oversees the activities related to the Board of Zoning Appeals, recommendations from the Area Plan Commission and the Historic Preservation Commission, as well as all related matters addressing annexation and zoning.

Dr. Oliver Davis, Chairperson  
Sheila Niezgodski, Vice-Chairperson  
*Citizen Member*

Ophelia Gooden-Rodgers, Member  
Karen L. White, Member  
*Citizen Member*

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### **SUB-COMMITTEE ON MINUTES**

Reviews the minutes prepared by the Office of the City Clerk of the regular, special, and informal meetings of the Common Council and makes a recommendation on their approval/modification to the Council.

Troy Warner, Member

Sherry Bolden-Simpson, Member





## 2025 COMMON COUNCIL STANDING COMMITTEES (Rev.01-09-2025)

### **CANNETH LEE, 1<sup>ST</sup> District Council Member**

#### **President**

Council Rules Committee, Member

### **OPHELIA GOODEN-RODGERS, 2<sup>ND</sup> District Council Member**

#### **Community Relations Committee, Chairperson**

Public Works & Property Vacation Committee, Vice-Chairperson

Community Investment Committee, Member

PARC Committee, Member

Residential Neighborhoods Committee, Member

Utilities Committee, Member

Zoning & Annexation Committee, Member

### **SHARON L. MCBRIDE, 3<sup>RD</sup> District Council Member**

#### **PARC Committee, Chairperson**

Residential Neighborhoods Committee, Member

Health & Public Safety Committee, Member

Information & Technology Committee, Member

### **TROY WARNER, 4<sup>TH</sup> District Council Member**

#### **Chairperson, Committee of the Whole**

Community Investment Committee, Chairperson

Council Rules Committee, Member

PARC Committee, Member

Health and Public Safety, Member

Public Works & Property Vacation, Member

Sub-Committee on the Minutes, Member

### **SHERRY BOLDEN-SIMPSON, 5<sup>TH</sup> District Council Member**

#### **Utilities Committee, Chairperson**

Information & Technology, Vice-Chairperson

Sub-Committee on Minutes, Member

Community Relations Committee, Member

Community Investment Committee, Member

### **SHEILA NIEZGODSKI, 6<sup>TH</sup> District Council Member**

#### **Personnel & Finance Committee, Chairperson**

#### **Public Works & Property Vacation, Chairperson**

Residential Neighborhoods Committee, Vice-Chairperson

Zoning & Annexation Committee, Vice-Chairperson

Community Relations Committee, Member

Utilities Committee, Member

### **DR. OLIVER DAVIS, AT LARGE Council Member**

#### **Zoning & Annexation Committee, Chairperson**

Health and Public Safety Committee, Vice-Chairperson

Utilities Committee, Vice-Chairperson

Public Works & Property Vacation, Member

Personnel & Finance Committee, Member

Information & Technology, Member

### **RACHEL TOMAS MORGAN, AT LARGE Council Member**

#### **Vice-President**

Health & Public Safety Committee, Chairperson

Information & Technology Committee, Chairperson

Council Rules Committee, Member

Personnel & Finance Committee, Member

### **KAREN L. WHITE, AT LARGE Council Member**

Residential Neighborhoods Committee, Chairperson

Community Investment Committee, Vice-Chairperson

Community Relations Committee, Vice-Chairperson

PARC Committee, Vice-Chairperson

Personnel & Finance Committee, Vice-Chairperson

Zoning & Annexation Committee, Member



63-24



# CITY OF SOUTH BEND

## COMMUNITY INVESTMENT

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October 23, 2023

Sharon L. McBride, President  
South Bend Common Council  
4th Floor, County-City Building

**RE: Lafayette Falls Extension Annexation Area, south of Lafayette Falls Phase I Annexation Area and west of S US-31 Highway**

Dear President McBride:

Attached is an Ordinance for the proposed annexation at the above referenced location. Please include this Ordinance on the Council agenda for first reading at the October 28, 2024, Council meeting; for second reading at the January 13, 2025, Council meeting; and for third reading at the January 27, 2025, Council meeting. Per the provisions of Section 21-01.02(g) of the South Bend Municipal Code, the property would automatically be zoned to S1 Suburban Neighborhood 1 District upon annexation without needing a public hearing before the South Bend Plan Commission.

The petitioner provided the following to describe the proposed project:

Annexation of R-Residential parcels from St. Joseph County into the City of South Bend as S1 Suburban Neighborhood 1.

If you have any questions, please feel free to contact me at (574) 235-7625. Thank you.

Sincerely,

A handwritten signature in black ink, appearing to read "Amani Morrell", is written over a white background.

Amani Morrell  
Principal Development Planner

cc: Bob Palmer, Attorney, Common Council  
Staff, South Bend Plan Commission

Filed in Clerk's Office

OCT 23 2024

Bianca Tirado  
City Clerk, South Bend, IN

**BILL NO. 63-24**

**OCT 23 2024**

**ORDINANCE NO. \_\_\_\_\_**

Bianca Tirado  
City Clerk, South Bend, IN

**AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA, ANNEXING TO AND BRINGING WITHIN THE CITY LIMITS OF SOUTH BEND, INDIANA, CERTAIN LAND LOCATED IN CENTRE TOWNSHIP, CONTIGUOUS THEREWITH; COUNCILMANIC DISTRICT NO. 5, FOR LAND SOUTH OF LAFAYETTE FALLS PHASE I ANNEXATION AREA AND WEST OF S US-31 HIGHWAY, SOUTH BEND, INDIANA**

**STATEMENT OF PURPOSE AND INTENT**

Petitioner desires to annex a portion of two properties south of Lafayette Falls Phase I Annexation area and west of S US-31 Highway; the properties would be automatically zoned to S1 Suburban Neighborhood 1 District in South Bend.

**NOW, THEREFORE, BE IT ORDAINED** by the Common Council of the City of South Bend, Indiana, as follows:

**SECTION I.** That the following described real estate is situated in St. Joseph County, Indiana, being contiguous by more than one-eighth (1/8) of its aggregate external boundaries with the present boundaries of the City of South Bend, Indiana, shall be and hereby is annexed to and brought within the City of South Bend:

A part of those lands conveyed to Lafayette Falls, LLC as described in Instrument Number 2020-06998 and Instrument Number 1723447 – Parcel 2, as recorded in the St. Joseph County Recorder's Office, and part of those lands conveyed to the State of Indiana as described in Instrument Number 1113186 and Instrument Number 1115059, as recorded in said Recorder's Office, and being situated in the South Half of Section 2, Township 36 North, Range 2 East, Centre Township, St. Joseph County Indiana, and being more particularly described as follows:

Commencing at the West Quarter corner of said Section 2 and being the Northwest corner of Outlot "A", as shown on the recorded plat of Zeiger's US 31 Minor Subdivision, recorded as Instrument Number 0516808 in said Recorder's Office; thence Easterly, along the North line of said Outlot "A", a distance of 2633 feet, more or less, to the Northeast corner of said Outlot "A", also being the center of said Section 2; thence Easterly, along the North line of Lot 2 of said Zeiger's US 31 Minor Subdivision, a distance of 406 feet, more or less, to the Easterly line of said State of Indiana land as described in Instrument Number 1113186, St Joseph County Recorder; thence

Southwesterly, along the Easterly line of said State of Indiana Land, a distance of 771 feet, more or less, to a point lying 680 feet South of the Easterly extension of the North line of said Outlot "A"; thence Westerly, parallel with the North line of said Outlot "A", a distance of 2667 feet, more or less, to the West line of said Section 2 and being the West line of Outlot "A"; thence Northerly, along the West line of said Section 2 and the West line of Outlot "A", a distance of 680 feet, more or less, to the Point of Beginning.

Containing 44.6 acres, more or less, and being subject to all rights-of-way, covenants, easements, and restrictions of record.

**SECTION II.** That the boundaries of the City of South Bend, Indiana, shall be and are hereby declared to be extended so as to include the real estate of the above-described parcel as part of the City of South Bend, Indiana.

**SECTION III.** Ordinance No. 10689-19, as amended, which ordinance is commonly known as the Zoning Ordinance of the City of South Bend, Indiana, be and the same hereby amended in order that the zoning classification of the above described real estate, with the exception of all adjacent rights-of-way, in the City of South Bend, St. Joseph County, State of Indiana be and the same is hereby established as S1 Suburban Neighborhood 1 District, per the provisions of Section 21-01.02(g) of the South Bend Municipal Code.

**SECTION IV.** This Ordinance shall be in full force and effect 30 days from and after its passage by the Common Council, approval by the Mayor, and legal publication.

\_\_\_\_\_  
Sharon McBride, Council President  
South Bend Common Council

Attest:

\_\_\_\_\_  
Bianca L. Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana on the \_\_\_\_\_ day of \_\_\_\_\_, 2024, at \_\_\_\_\_ o'clock \_\_\_\_ . m.

\_\_\_\_\_  
Bianca L. Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2024, at \_\_\_\_ o'clock \_\_\_\_ .m.

\_\_\_\_\_  
James Mueller, Mayor  
City of South Bend, Indiana

OCT 25 2024

Bianca Tirado  
City Clerk, South Bend, IN



Department of  
**Community Investment**

**Memorandum**

Friday, October 25, 2024

TO: Derek Erquhart, Fire  
Kara Boyles, Engineering  
Timothy Lancaster and Joseph Leszczynski, Police  
Kari Myers, Community Investment - Zoning  
Tom Panowicz, Legal  
Kelly Smith, Solid Waste  
Kenisha Wells, Neighborhood Services & Enforcement  
Kyle Willis, Administration & Finance

FROM: Amani Morrell, Principal Development Planner

SUBJECT: Request for Service Reports  
**Lafayette Falls Extension Annexation Area**  
(100% Voluntary Annexation of Contiguous Property)

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A petition for voluntary annexation of the Lafayette Falls Extension Annexation Area has been submitted to the City and will receive First Reading by the Common Council on Monday, October 28, 2024.

The proposed Annexation Area consists of the northern portion of two parcels and adjacent right-of-way totaling about 44.6 acres and is located south of the Lafayette Falls Phase I Annexation Area and west of S US-31 Highway. The site is vacant and is zoned R-Residential in the County. With the annexation, the petitioner seeks zoning of S1 Suburban Neighborhood 1 to develop approximately 111 houses in the area, primarily single family.

**Please complete the Service Report** addressing how your Department will or can provide City services to the proposed Annexation Area, and return it to me **by November 8, 2024**. This deadline must be met so that the Legal Department can prepare the necessary resolutions in time to be considered by the Board of Public Works and the Board of Public Safety. A fact sheet, map, and an annexation schedule are attached to assist you in your review.

If you have any questions, please contact me at (574) 235-7625 or amorrell@southbendin.gov.

cc: Mayor James Mueller  
Allie Dolz-Lane, Chief of Staff, Office of the Mayor  
Bob Palmer, Attorney for the Common Council  
Caleb Bauer, Executive Director, Community Investment  
Tim Corcoran, Director of Planning, Community Investment  
Bianca Tirado, City Clerk  
Staff, City Clerk  
Robert Kruszynski, County Surveyor

## SERVICE REPORT CHECK LIST

- Department of Law:* 1) legal concerns, if any (if none, no report is required)
- Public Works:* 1) location, size, and capacity of water line(s)  
2) listing of properties connected to water line(s)  
3) location, size, and capacity of sewer line(s)  
4) listing of properties connected to sewer line(s)  
5) any public improvements required or suggested, such as street signs, street lighting, pavement upgrade, storm drainage  
6) cost, timing, and source of funds for providing those improvements (within 1 year for non-capital items and 3 years for capital items)  
7) a listing of properties covered by waivers
- Police Department:* 1) Police Beat to be assigned  
2) cost, timing, and source of funds of providing any improvements  
3) whether comparable response time can be maintained
- Fire Department:* 1) primary and secondary fire stations to be assigned  
2) cost, timing, and source of funds of providing any improvements  
3) whether comparable response time can be maintained
- Neighborhood Services:* 1) Inspector Area to be assigned  
2) whether comparable response time can be maintained
- Zoning:* 1) current zoning of property  
2) anticipated/required zoning  
3) compatibility of land uses relative to city zoning  
4) copies of recorded subdivision plats, if any
- Admin/Finance:* 1) (no report necessary for this annexation)
- Solid Waste:* 1) capacity to provide solid waste service  
2) cost to owner of service  
3) when service can begin
- County Surveyor:* 1) verify accuracy of legal description

<b>A. Annexation Criteria (Minimum)</b>	<b>Analysis</b>	<b>Criteria Met?</b>
1. Contiguity: At least 1/8 (12.5%) <i>and</i>	<b>59.2%</b>	<b>Yes</b>
2. 100% of owners signed petition <i>and</i>	<b>100%</b>	<b>Yes</b>
3. a. essential City services are/can be provided		<b>Yes</b>
b. City is able to provide services		<b>Yes</b>
c. territory is contiguous		<b>Yes</b>

**B. General**

Location: South of Lafayette Falls Phase I Annexation Area and west of S US-31 Highway

Address(es): Vacant land at US 31 South and Lafayette Falls Outlot

Tax Key Number(s): 001-1002-002201 and 001-1002-002444

Subdivision(s) of Record: Zeiger's U.S 31 Minor

Acres: 44.6

Current Net Assessment: \$62,400

Current Population: 0  
Proposed Population: 0 (estimated at 250 at project buildout)

Current Land Use: Vacant land  
Proposed Land Use: Residential: primarily single family

Current Zoning: R Single Family District, St. Joseph County  
Proposed Zoning: S1 Suburban Neighborhood 1, City of South Bend

Council District: 5<sup>th</sup> Council District

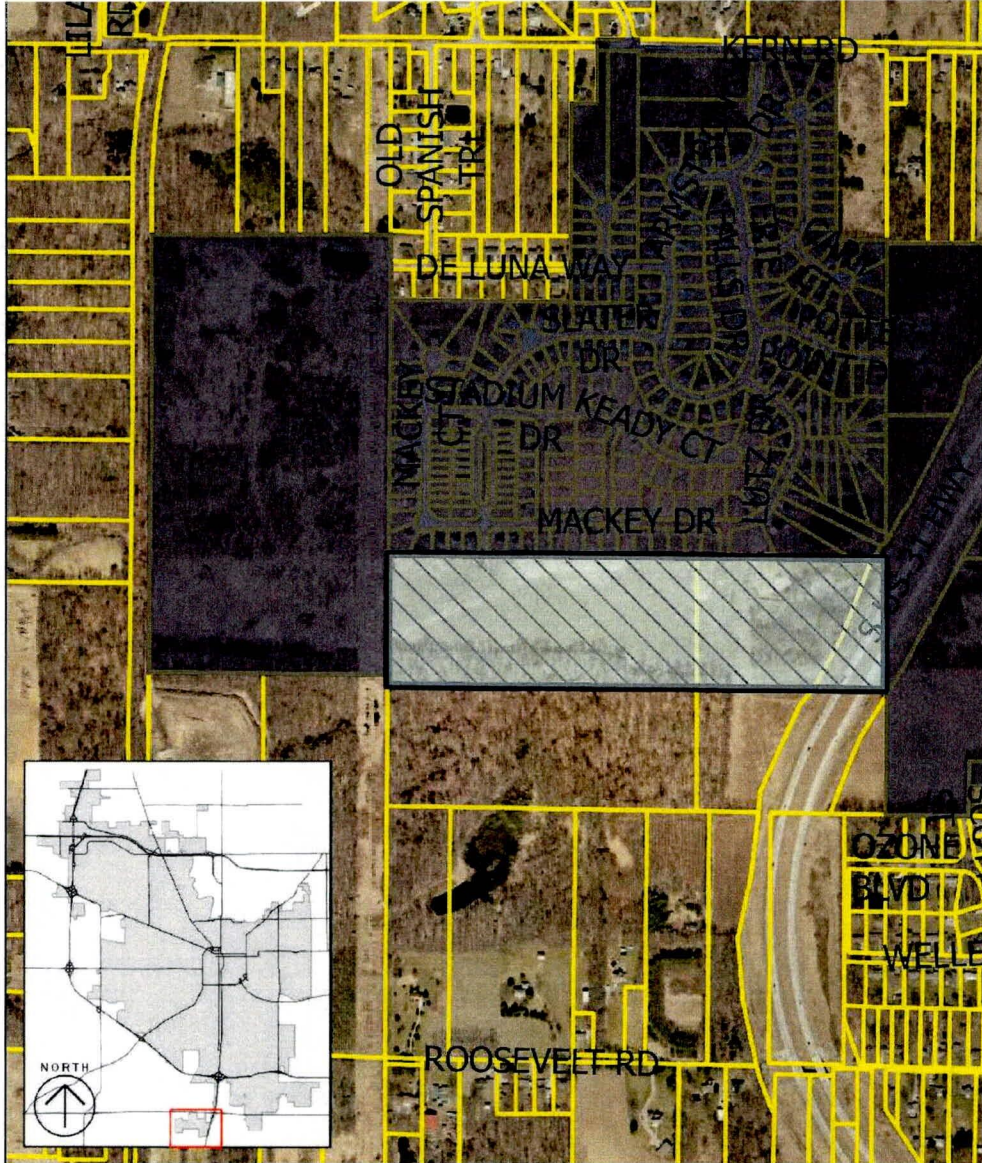
Scheduled Effective Date: March 9, 2025

Comments: Proposed Annexation Area includes the adjacent S US-31 Highway



Map

# Lafayette Falls Extension Annexation Area



Lafayette Falls Extension Annexation Area



City of South Bend

## Legal Description

A part of those lands conveyed to Lafayette Falls, LLC as described in Instrument Number 2020-06998 and Instrument Number 1723447 – Parcel 2, as recorded in the St. Joseph County Recorder's Office, and part of those lands conveyed to the State of Indiana as described in Instrument Number 1113186 and Instrument Number 1115059, as recorded in said Recorder's Office, and being situated in the South Half of Section 2, Township 36 North, Range 2 East, Centre Township, St. Joseph County Indiana, and being more particularly described as follows:

Commencing at the Northwest corner of the Northeast Quarter of the Southwest Quarter of said Section 2 and being the Northwest corner of Outlot "A", as shown on the recorded plat of Zeiger's US 31 Minor Subdivision, recorded as Instrument Number 0516808 in said Recorder's Office; thence Easterly, along the North line of said Outlot "A", a distance of 2633 feet, more or less, to the Northeast corner of said Outlot "A", also being the center of said Section 2; thence Southerly along existing City limits a distance of 680 feet; thence Westerly, parallel with the North line of said Outlot "A", a distance of 2667 feet, more or less, to the West line of the Northeast Quarter of the Southwest Quarter of said Section 2 and being the West line of Outlot "A"; thence Northerly, along the West line of the Northeast Quarter of the Southwest Quarter of said Section 2 and the West line of Outlot "A", a distance of 680 feet, more or less, to the Point of Beginning.

Containing 44.6 acres, more or less, and being subject to all rights-of-way, covenants, easements, and restrictions of record.

## Proposed Schedule for Lafayette Falls Extension Annexation Area

File Date	10/23/24
1st Reading	10/28/24
Service Report Request	10/25/24
Service Report Due	11/8/24
Fiscal Plan Done	11/25/24
BPW Agenda Session	12/5/24
BPW Hearing	12/10/24
BPS	N/A
PC Public Hearing	N/A
Council Advertisement	12/20/24
FP Resolution to Clerk	1/8/25
2nd Reading	1/13/25
3rd Reading	1/27/25
Advertised	2/7/25
Appeal Period Start	2/7/25
Appeal Period End	3/9/25



# ***(Substitute)*** 74-24

1200 COUNTY-CITY BUILDING  
227 W. JEFFERSON BOULEVARD  
SOUTH BEND, INDIANA 46601-1830



PHONE: 574/235-9241  
FAX: 574/235-7670  
TTY: 574/235-5567

CITY OF SOUTH BEND JAMES MUELLER, MAYOR

## DEPARTMENT OF LAW

SANDRA KENNEDY  
CORPORATION COUNSEL

JENNA K. THROW  
CITY ATTORNEY

January 6, 2025

**Filed in Clerk's Office**

**South Bend Common Council**  
**227 West Jefferson Blvd, Suite 441 S**  
**South Bend, Indiana 46601**

**JAN 06 2025**

**Bianca Tirado**  
**City Clerk, South Bend, IN**

**Re: Substitute Ordinance Establishing a Fire Department Merit Commission**

Honorable Council Members,

The South Bend Fire Department originally submitted a draft ordinance establishing a merit system for the Fire Department pursuant to I.C. § 36-8-3.5-1. The applicable statute states that the “merit system shall be considered to be established by the ordinance ... that adopts all of the provisions applicable to the establishing unit.” A substitute ordinance is enclosed which better clarifies the responsibilities of the Board of Public Safety under I.C. § 36-8-3.5-8. Specifically, the substituted ordinance adds language stating that the Board of Public Safety will establish procedures whereby the members of the fire department elect commissioners. The added language clarifies that the Board of Public Safety has a role in the election process.

The South Bend Fire Department is requesting the Common Council's review and approval of the enclosed substitute ordinance.

Thank you for your consideration.

Sincerely,

A handwritten signature in black ink that reads "1/6/25 Adam E. Taylor".

Adam E. Taylor  
Assistant City Attorney

---

DANIELLE WEISS

MICHAEL SCHMIDT

KYLIE CONNELL

THOMAS E. PANOWICZ

JESSICA MCLAIN

ADAM E. TAYLOR

JOHN DORBIN

JAN 06 2025

Bianca Tirado  
City Clerk, South Bend, IN

**SUBSTITUTE BILL NO. 74-24**

**ORDINANCE NO. \_\_\_\_\_**

**AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF  
SOUTH BEND, INDIANA, ESTABLISHING A MERIT BOARD SYSTEM GOVERNING  
THE SOUTH BEND FIRE DEPARTMENT**

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**STATEMENT OF PURPOSE AND INTENT**

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The power of selection, appointment, promotion, demotion, disciplinary action, and dismissal of members of the City of South Bend Fire Department has historically been delegated to the Board of Public Safety.

Following the enactment of I.C. 36-8-3.5 et seq., Fire Departments in Indiana are required to establish a Merit Board for the purposes of selection, appointment, promotion, demotion, disciplinary action, and dismissal of members of the City of South Bend Fire Department.

If a merit system under I.C. 36-8-3.5 et seq. is not established or rejected by December 31, 2024 by the agreement of the active members of the Fire Department and the City of South Bend, a merit system under I.C. 36-8-3.5 is established on January 1, 2025, as set forth in I.C. 36-8-3.5-5.5(f).

A merit system established under I.C. 36-8-3.5-5.5(f) must still be established by an ordinance adopted by the legislative body of the municipality adopting the applicable provisions.

As a merit system is not expected to be established for the South Bend Fire Department under either I.C. 36-8-3.5 or I.C. 36-1-4-14 on or before December 31, 2024, this ordinance is intended to establish a merit system as set forth in I.C. 36-8-3.5-5.5(f).

**NOW, THEREFORE, BE IT ORDAINED** by the Common Council of the City of South Bend, Indiana, as follows:

**SECTION I.** The foregoing Recitals are incorporated herein by this reference.

**SECTION II.** Chapter 2, Article 5, Section 2-63, entitled "Fire Department Merit System", is hereby added to the South Bend City Code and shall read as follows:

**"Sec. 2-63. Fire Department Merit System"**

Sec. 2-63 Establishment of Merit System.

- (a) Pursuant to I.C., 36-8-3.5 et seq., a merit system is hereby established for the City of South Bend Fire Department ("Department"). The merit system will be administered by a Commission to be known as the South Bend Fire Department Merit Commission

("Commission"), pursuant to requirements set forth in I.C., 36-8-3.5 et seq. and this Ordinance. Unless otherwise stated herein, the provisions of I.C., 36-8-3.5 et seq. will govern the merit system and the Commission, as amended.

- (b) Commissioners of the Merit Commission shall be appointed as set forth in I.C. 36-8-3.5-6, as amended.
- (c) The Board of Public Safety shall set the meeting, and establish applicable procedures, for the election of Commissioners by the active members of the Fire Department as set forth in I.C. 36-8-3.5-8, and is authorized to assist in the administration of the voting process in a manner consistent with I.C. 36-8-3.5-8.
- (d) The Board of Public Safety shall retain the power of selection, appointment, promotion, demotion, disciplinary action, and dismissal of members of the City of South Bend Fire Department, pursuant to Indiana law, including but not limited to Indiana Code 36-8-3-3, 4, and 4.1, until the Fire Merit Commission has adopted rules for these powers.

**SECTION III.** This Ordinance shall be effective from and of the date of adoption by the Common Council, and approval by the Mayor.

\_\_\_\_\_  
Council President  
South Bend Common Council

Attest:

\_\_\_\_\_  
Bianca L. Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_\_ o'clock \_\_\_\_\_.m.

\_\_\_\_\_  
Bianca L. Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_ o'clock \_\_\_\_\_.m.

\_\_\_\_\_  
James Mueller, Mayor  
City of South Bend, Indiana

JAN 06 2025

Bianca Tirado  
City Clerk, South Bend, IN

**SUBSTITUTE BILL NO. 74-24**

**ORDINANCE NO. \_\_\_\_\_**

**AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF  
SOUTH BEND, INDIANA, ESTABLISHING A MERIT BOARD SYSTEM GOVERNING  
THE SOUTH BEND FIRE DEPARTMENT**

---

**STATEMENT OF PURPOSE AND INTENT**

---

The power of selection, appointment, promotion, demotion, disciplinary action, and dismissal of members of the City of South Bend Fire Department has historically been delegated to the Board of Public Safety.

Following the enactment of I.C. 36-8-3.5 et seq., Fire Departments in Indiana are required to establish a Merit Board for the purposes of selection, appointment, promotion, demotion, disciplinary action, and dismissal of members of the City of South Bend Fire Department.

If a merit system under I.C. 36-8-3.5 et seq. is not established or rejected by December 31, 2024 by the agreement of the active members of the Fire Department and the City of South Bend, a merit system under I.C. 36-8-3.5 is established on January 1, 2025, as set forth in I.C. 36-8-3.5-5.5(f).

A merit system established under I.C. 36-8-3.5-5.5(f) must still be established by an ordinance adopted by the legislative body of the municipality adopting the applicable provisions.

As a merit system is not expected to be established for the South Bend Fire Department under either I.C. 36-8-3.5 or I.C. 36-1-4-14 on or before December 31, 2024, this ordinance is intended to establish a merit system as set forth in I.C. 36-8-3.5-5.5(f).

**NOW, THEREFORE, BE IT ORDAINED** by the Common Council of the City of South Bend, Indiana, as follows:

**SECTION I.** The foregoing Recitals are incorporated herein by this reference.

**SECTION II.** Chapter 2, Article 5, Section 2-63, entitled "Fire Department Merit System", is hereby added to the South Bend City Code and shall read as follows:

**"Sec. 2-63. Fire Department Merit System"**

Sec. 2-63 Establishment of Merit System.

- (a) Pursuant to I.C., 36-8-3.5 et seq., a merit system is hereby established for the City of South Bend Fire Department ("Department"). The merit system will be administered by a Commission to be known as the South Bend Fire Department Merit Commission



("Commission"), pursuant to requirements set forth in I.C., 36-8-3.5 et seq. and this Ordinance. Unless otherwise stated herein, the provisions of I.C., 36-8-3.5 et seq. will govern the merit system and the Commission, as amended.

- (b) Commissioners of the Merit Commission shall be appointed as set forth in I.C. 36-8-3.5-6, as amended.
- (c) The Board of Public Safety shall set the meeting, and establish applicable procedures, for the election of Commissioners by the active members of the Fire Department as set forth in I.C. 36-8-3.5-8, and is authorized to assist in the administration of the voting process in a manner consistent with I.C. 36-8-3.5-8.
- (d) The Board of Public Safety shall retain the power of selection, appointment, promotion, demotion, disciplinary action, and dismissal of members of the City of South Bend Fire Department, pursuant to Indiana law, including but not limited to Indiana Code 36-8-3-3, 4, and 4.1, until the Fire Merit Commission has adopted rules for these powers.

**SECTION III.** This Ordinance shall be effective from and of the date of adoption by the Common Council, and approval by the Mayor.

\_\_\_\_\_  
Council President  
South Bend Common Council

Attest:

\_\_\_\_\_  
Bianca L. Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_\_ o'clock \_\_\_\_m.

\_\_\_\_\_  
Bianca L. Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_ o'clock \_\_\_\_m.

\_\_\_\_\_  
James Mueller, Mayor  
City of South Bend, Indiana

1200 COUNTY-CITY BUILDING  
227 W. JEFFERSON BOULEVARD  
SOUTH BEND, INDIANA 46601-1830



PHONE 574/235-9241  
FAX 574/235-7670  
TTY 574/235-5567

CITY OF SOUTH BEND JAMES MUELLER, MAYOR

## DEPARTMENT OF LAW

SANDRA KENNEDY  
CORPORATION COUNSEL

JENNA K. THROW  
CITY ATTORNEY

December 4, 2024

**Filed in Clerk's Office**

**South Bend Common Council**  
227 West Jefferson Blvd, Suite 441 S  
South Bend, Indiana 46601

DEC 04 2024

Bianca Tirado  
City Clerk, South Bend, IN

**Re: Proposed Ordinance Establishing a Merit Board**

Honorable Council Members,

The South Bend Fire Department is requesting the Council to approve an ordinance establishing a merit system for the Fire Department pursuant to I.C. § 36-8-3.5-1. A merit system has authority over appointment, promotion, demotion, disciplinary action, and dismissal of members of the department. The applicable statute states that a merit system is established effective January 1, 2025, unless rejected by December 31, 2024 both by an ordinance and by the members of the department. Given the support of Local 362 for the statutory merit system, the Fire Department and Union have opted to follow the state statute.

The applicable statute further states that the "merit system shall be considered to be established by the ordinance ... that adopts all of the provisions applicable to the establishing unit." The South Bend Fire Department is requesting the Common Council's review and approval of the enclosed draft ordinance, which both codifies the reference to the applicable merit system statutes and clarifies the role of the Board of Public Safety after January 1, 2025.

I request that this bill be placed for first reading on December 9, 2024 and for second and third reading on January 13, 2025.

Thank you for your consideration.

Sincerely,

A handwritten signature in black ink that reads "Adam E. Taylor".

Adam E. Taylor  
Assistant City Attorney

DANIELLE WEISS

MICHAEL SCHMIDT

KYLIE CONNELL

THOMAS E. PANOWICZ

JESSICA MCLAIN

ADAM E. TAYLOR

JOHN DORBIN

DEC 04 2024

Bianca Tirado  
City Clerk, South Bend, IN

**BILL NO. 74-24**

**ORDINANCE NO. \_\_\_\_\_**

**AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF  
SOUTH BEND, INDIANA, ESTABLISHING A MERIT BOARD SYSTEM GOVERNING  
THE SOUTH BEND FIRE DEPARTMENT**

---

**STATEMENT OF PURPOSE AND INTENT**

---

The power of selection, appointment, promotion, demotion, disciplinary action, and dismissal of members of the City of South Bend Fire Department has historically been delegated to the Board of Public Safety.

Following the enactment of I.C. 36-8-3.5 et seq., Fire Departments in Indiana are required to establish a Merit Board for the purposes of selection, appointment, promotion, demotion, disciplinary action, and dismissal of members of the City of South Bend Fire Department.

If a merit system under I.C. 36-8-3.5 et seq. is not established or rejected by December 31, 2024 by the agreement of the active members of the Fire Department and the City of South Bend, a merit system under I.C. 36-8-3.5 is established on January 1, 2025, as set forth in I.C. 36-8-3.5-5.5(f).

A merit system established under I.C. 36-8-3.5-5.5(f) must still be established by an ordinance adopted by the legislative body of the municipality adopting the applicable provisions.

As a merit system is not expected to be established for the South Bend Fire Department under either I.C. 36-8-3.5 or I.C. 36-1-4-14 on or before December 31, 2024, this ordinance is intended to establish a merit system as set forth in I.C. 36-8-3.5-5.5(f).

**NOW, THEREFORE, BE IT ORDAINED** by the Common Council of the City of South Bend, Indiana, as follows:

**SECTION I.** The foregoing Recitals are incorporated herein by this reference.

**SECTION II.** Chapter 2, Article 5, Section 2-63, entitled "Fire Department Merit System", is hereby added to the South Bend City Code and shall read as follows:

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Sec. 2-63 Establishment of Merit System.

- (a) Pursuant to I.C., 36-8-3.5 et seq., a merit system is hereby established for the City of South Bend Fire Department ("Department"). The merit system will be administered by a Commission to be known as the South Bend Fire Department Merit Commission

("Commission"), pursuant to requirements set forth in I.C., 36-8-3.5 et seq. and this Ordinance. Unless otherwise stated herein, the provisions of I.C., 36-8-3.5 et seq. will govern the merit system and the Commission, as amended.

- (b) Commissioners of the Merit Commission shall be appointed as set forth in I.C. 36-8-3.5-6, as amended.
- (c) The Board of Public Safety shall retain the power of selection, appointment, promotion, demotion, disciplinary action, and dismissal of members of the City of South Bend Fire Department, pursuant to Indiana law, including but not limited to Indiana Code 36-8-3-3, 4, and 4.1, until the Fire Merit Commission has adopted rules for these powers.

**SECTION III.** This Ordinance shall be effective from and of the date of adoption by the Common Council, and approval by the Mayor.

---

Sharon McBride, Council President  
South Bend Common Council

Attest:

---

Bianca L. Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana on the \_\_\_\_\_ day of \_\_\_\_\_, 2024, at \_\_\_\_\_ o'clock \_\_\_\_\_.m.

---

Bianca L. Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2024, at \_\_\_\_ o'clock \_\_\_\_\_.m.

---

James Mueller, Mayor  
City of South Bend, Indiana

# 25-01



## CITY OF SOUTH BEND COMMUNITY INVESTMENT

January 7, 2024

Filed in Clerk's Office

Council Member Troy Warner  
Chairperson, Community Investment Committee  
South Bend Common Council  
County-City Building, 4<sup>th</sup> Floor  
South Bend, Indiana 46601

JAN 08 2025

Bianca Tirado  
City Clerk, South Bend, IN

RE: **Declaratory Resolution**: Mixed-Use Development Real Property Tax Abatement for  
**RSPG Global Consulting LLC**

Dear Council Member Warner,

Please find the enclosed Declaratory Resolution and supporting information pertaining to a tax abatement petition submitted by RSPG Global Consulting LLC, an Indiana Domestic Liability Company. This petition package includes:

- Department of Community Investment's summary report
- Petition for abatement
- Statement of Benefits forms (SB-1 / Real Property)
- Supporting information

The report contains the Department's findings relative to the above-mentioned petition. The petitioner intends to redevelop the property at **225, 227 & 229 S. Michigan** to reactivate the vacant building known as Center City Place. This includes restoring the historic facade, completing extensive repairs and renovations, and filling the building with active businesses. Creating new functioning spaces downtown will help to drive interest in developing other unused buildings in the immediate vicinity as well as bring more traffic to the small businesses currently operating in the area.

The total investment for this project is \$5,825,000. The project meets the qualifications for an eight-year (8) mixed-use development real property tax abatement.

A representative from RSPG Global Consulting LLC, will be available to meet with the Committee on Monday, January 13, 2025.

If you or other Council members have questions about the report or need additional information, please feel free to call me at (574) 235-5838.

Sincerely,

Joseph Molnar  
Assistant Director, Growth and Opportunity

JAN 08 2025

Bianca Tirado  
City Clerk, South Bend, IN

**BILL NO. 25-01**  
**RESOLUTION NO. \_\_\_\_\_**

A RESOLUTION OF THE COMMON COUNCIL OF THE  
CITY OF SOUTH BEND DESIGNATING CERTAIN AREAS WITHIN  
THE CITY OF SOUTH BEND, INDIANA, COMMONLY KNOWN AS

**225 S. Michigan, South Bend, Indiana 46601**

AND

**229 S. Michigan, South Bend, Indiana 46601**

AN ECONOMIC REVITALIZATION AREA FOR PURPOSES OF A  
EIGHT-YEAR (8) REAL PROPERTY TAX ABATEMENT FOR

**RSPG Global Consulting LLC**

WHEREAS, a petition for real property tax abatement consideration has been filed with the City Clerk for consideration by the Common Council of the City of South Bend, Indiana, requesting that the area described as:

*Key Number:* 71-08-12-157-010.000-026  
*Local Parcel Number:* 018-3007-0248  
*Commonly Known As:* 229 S. Michigan Street  
*Legal Description:* 24'S SIDE LOT 287 O P SO BEND

*Key Number:* 71-08-12-157-009.000-026  
*Local Parcel Number:* 018-3007-0247  
*Commonly Known As:* 225 S. Michigan Street  
*Legal Description:* 42' North Side Except 5 3/8 North Side Lot 287 Op  
South Bend

be designated as an Economic Revitalization Area under the provisions of Indiana Code 6-1.1-12.1 et seq. and South Bend Municipal Code Sections 2-76 et seq.; and

WHEREAS, the petitioner has agreed to and has accepted responsibility to report any changes in the Key Numbers and legal descriptions to the Department of Community Investment and to the Office of the City Clerk; and

WHEREAS, the Department of Community Investment has concluded an investigation and prepared a report with information sufficient for the Common Council to determine that the area

qualifies as an Economic Revitalization Area under Indiana Code 6-1.1-12.1 et seq. and South Bend Municipal Code Sections 2-76 et seq., and has further prepared maps and plats showing the boundaries and such other information regarding the area in question as required by law; and

WHEREAS, the Community Investment Committee of the Common Council has reviewed said report and recommended to the Common Council that the area qualifies as an Economic Revitalization Area.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

SECTION I. The Common Council hereby determines and finds that the Petition for Real Property Tax Abatement and the Statement of Benefits form completed by the Petitioner meet the requirements of Indiana Code 6-1.1-12.1 et seq. for tax abatement.

SECTION II. The Common Council hereby determines and finds the following:

A. That the description of the proposed redevelopment or rehabilitation meets the applicable standards for such development;

B. That the estimate of the value of the redevelopment or rehabilitation is reasonable for projects of this nature;

C. That the estimate of the number of individuals who will be employed or whose employment will be retained by the Petitioner can reasonably be expected to result from the proposed described redevelopment or rehabilitation;

D. That the estimate of the annual salaries of those individuals who will be employed or whose employment will be retained by the Petitioner can be reasonably expected to result from the proposed redevelopment or rehabilitation;

E. That the other benefits about which information was requested are benefits that can be reasonably expected to result from the proposed described redevelopment or rehabilitation; and

F. That the totality of benefits is sufficient to justify the requested deduction, all of which satisfy the requirements of Indiana Code 6-1.1-12.1-3.

SECTION III. The Common Council hereby determines and finds that the proposed described redevelopment or rehabilitation can be reasonably expected to yield benefits identified in the Statement of Benefits, Sections 1 through 3 of the Petition for Real Property Tax Abatement Consideration and the Memorandum of Agreement between the Petitioner and the City of South Bend, and that the Statement of Benefits form completed by the petitioner, said form being prescribed by the State Board of Accounts, is sufficient to justify the deduction granted under Indiana Code 6-1.1-12.1-3.

SECTION IV. The Common Council hereby accepts the report and recommendation of the Community Investment Committee that the area herein described be designated as an Economic

Revitalization Area and hereby adopts a Resolution designating the area as an Economic Revitalization Area for purposes of real property tax abatement.

SECTION V. The designation as an Economic Revitalization Area shall expire on December 31, 2027.

SECTION VI. The Common Council hereby determines that the property owner is qualified for and is granted property tax deduction for a period of eight (8) years as shown by the schedule outlined below as well as the attachment pursuant to Indiana Code 6-1.1-12.1-17.

- Year 1 - 100%
- Year 2 - 95%
- Year 3 - 95%
- Year 4 - 90%
- Year 5 - 80%
- Year 6 - 80%
- Year 7 - 60%
- Year 8 - 50%

SECTION VII. The Common Council directs the City Clerk to cause notice of the adoption of this Declaratory Resolution for Real Property Tax Abatement to be published pursuant to Indiana Code 5-3-1 and Indiana Code 6-1.1-12.1-2.5, said publication providing notice of the public hearing before the Common Council on the proposed confirming of said declaration.

SECTION VIII. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approval by the Mayor.

---

Canneth Lee, Council President  
South Bend Common Council

Attest:

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Bianca Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana, on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_\_ o'clock \_\_\_\_ .m.



---

Bianca Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_ o'clock  
\_\_\_\_.m.

---

James Mueller, Mayor  
City of South Bend

JAN 08 2025

Bianca Tirado  
City Clerk, South Bend, IN

# TAX ABATEMENT REPORT

TO: South Bend Common Council

FROM: Joseph Molnar, Assistant Director, Growth and Opportunity

SUBJECT: Mixed-Use Development Real Property Tax Abatement Petition  
for **RSPG Global Consulting LLC**

DATE: January 8, 2025

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On January 8, 2025, a petition for tax abatement from **RSPG Global Consulting LLC** was filed with the Office of the City Clerk. The petition seeks consideration for a mixed-use development real property tax abatement for property at 225, 227, & 229 S. Michigan Street commonly known as the City Center Building

Pursuant to Chapter 2, Article 6, Section 2-84.9 of the Municipal Code of the City of South Bend, the petition was referred to the Department of Community Investment for purposes of investigation and preparation of a report determining whether the area qualifies as an Economic Revitalization Area pursuant to Indiana Code 6 1.1-12.1 and all zoning requirements have been met.

The Department of Community Investment has reviewed the petition, investigated the area, and makes the following report.

## Project Summary

- The petitioner, RSPG Global Consulting LLC, proposes to renovate the Center City Building into a mixed-use project. The project seeks to reactivate the building known as Center City Place. This includes restoring the historic facade, completing extensive repairs and renovations, and filling the building with active businesses
- The project will consist of renovating the full 38,000 sq. feet building into a mixed use development. Private investment into this project is approximately \$5,825,000.
- The project will greatly contribute to the vitality of south downtown South Bend and increase foot traffic for the entire area.

## Employment Impact

Per this petition and supporting material, it is estimated that the company will create:

- Upon completion of the current building's rehabilitation and conversion, at least eleven (11) new full-time jobs with an estimated total annual payroll of \$800,800.

## **Tax Estimates**

The petitioner qualifies for an eight-year (8) mixed-use development real property tax abatement.

- Current estimated combined annual real property taxes: \$8,436
- Estimated combined annual taxes after the project's completion: \$116,742
- Total estimated combined taxes during the eight-year (8) abatement period: \$933,795
  - Estimated taxes being abated during the abatement period: \$611,740
  - Estimated total taxes to be paid during the abatement period: \$322,055

## **Abatement Qualification**

1. A review of the tax abatements previously granted finds that the petitioner has not been granted a prior abatement.
2. The property is properly zoned for the proposed project.
3. Taxes on the property have been paid in full.
4. A review of the South Bend Redevelopment designation areas finds that the property is in the River West Development Area.
5. A review of the Tax Abatement Ordinance No. 9394-03 finds that the petitioner meets the qualifications for an eight-year (8) mixed-use development real property tax abatement under Division 5 (Mixed Use Development Real Property Tax Abatement), Section 2-80 (Mixed Use Developments in Central Business District).

## RSPG Global Consulting LLC

South Bend Portage Township  
Commerical Development Real Property Tax Abatement Schedule \*

Type of Property: Mixed Use  
Estimated Project Cost: \$ 4,000,000 Rehabilitation

Property Address: 225, 227, 229 S. Michigan  
Tax Key Number: 71-08-12-157-009.000-026 / 71-08-12-157-010.000-026

	Current	Without Abatement	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8
<b>Assessed Value (AV)</b>										
Land	\$ 38,600	\$ 38,600	\$ 38,600	\$ 38,600	\$ 38,600	\$ 38,600	\$ 38,600	\$ 38,600	\$ 38,600	\$ 38,600
Structure (AV = 80% Project Cost)	210,700	3,410,700	3,410,700	3,410,700	3,410,700	3,410,700	3,410,700	3,410,700	3,410,700	3,410,700
<b>Gross Assessed Value</b>	<b>249,300</b>	<b>3,449,300</b>	<b>3,449,300</b>	<b>3,449,300</b>	<b>3,449,300</b>	<b>3,449,300</b>	<b>3,449,300</b>	<b>3,449,300</b>	<b>3,449,300</b>	<b>3,449,300</b>
<b>Abatement</b>										
Abatement Deduction		-	(3,200,000)	(3,040,000)	(3,040,000)	(2,880,000)	(2,560,000)	(2,560,000)	(1,920,000)	(1,600,000)
<b>Net Assessed Value</b>	<b>249,300</b>	<b>3,449,300</b>	<b>249,300</b>	<b>409,300</b>	<b>409,300</b>	<b>569,300</b>	<b>889,300</b>	<b>889,300</b>	<b>1,529,300</b>	<b>1,849,300</b>
<b>Property Taxes</b>										
Assume constant tax rate of 5.3548%										
Gross Tax (Tax Rate x Net AV)	13,350	184,703	13,350	21,917	21,917	30,485	47,620	47,620	81,891	99,026
Local Tax Credit (12.3682% of GT-DS)	(1,533)	(21,206)	(1,533)	(2,516)	(2,516)	(3,500)	(5,467)	(5,467)	(9,402)	(11,369)
Circuit Breaker Credit	(3,381)	(46,773)	-	-	-	-	-	-	-	-
<b>Taxes Due</b>	<b>\$ 8,436</b>	<b>\$ 116,724</b>	<b>\$ 11,817</b>	<b>\$ 19,401</b>	<b>\$ 19,401</b>	<b>\$ 26,985</b>	<b>\$ 42,153</b>	<b>\$ 42,153</b>	<b>\$ 72,489</b>	<b>\$ 87,657</b>
<b>Circuit Breaker Cap</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>
Debt Service (0.3840% of Net AV)	7,479	103,479	103,479	103,479	103,479	103,479	103,479	103,479	103,479	103,479
<b>Max Tax Under the Cap</b>	<b>8,436</b>	<b>116,724</b>	<b>104,436</b>	<b>105,051</b>	<b>105,051</b>	<b>105,665</b>	<b>106,894</b>	<b>106,894</b>	<b>109,352</b>	<b>110,580</b>

Year	Abatement	Current Taxes Due	New Projected Tax	Combined Current & New Taxes	Taxes Abated	Net Taxes Paid
1	100%	\$ 8,436	\$ 108,288	\$ 116,724	\$ (104,907)	\$ 11,817
2	95%	8,436	108,288	116,724	(97,323)	19,401
3	95%	8,436	108,288	116,724	(97,323)	19,401
4	90%	8,436	108,288	116,724	(89,739)	26,985
5	80%	8,436	108,288	116,724	(74,571)	42,153
6	80%	8,436	108,288	116,724	(74,571)	42,153
7	60%	8,436	108,288	116,724	(44,235)	72,489
8	50%	8,436	108,288	116,724	(29,067)	87,657
<b>Total:</b>		<b>67,490</b>	<b>866,304</b>	<b>933,794</b>	<b>(611,740)</b>	<b>322,055</b>

\* This schedule is for estimation purposes only and assumes constant tax rates equal to those for 2023 Payable 2024.  
The true tax values will ultimately be determined by the actual assessed valuation and the then current tax rates.



# City of South Bend Petition for Incentives

Petition must include a \$250 filing fee payable to the "City of South Bend" before processing can be complete

Instructions: Complete pages 1-3 AND the proper Form SB-1 for the type of abatement (real property or personal property) for which you are applying.



General Information		Project Name	Project Number
Legal name as registered with Secretary of State	RSPG Global Consulting LLC		
Business structure	Domestic Limited Liability Company		
Company website	n/a		
Proposed Project Information			
Proposed project address	225, 227, 229 S. Michigan Street	Parent company name	RSPG Global Consulting LLC
City, State, Zip	South Bend, IN 46601	Legal owner	RSPG Global Consulting LLC
Site acreage or acreage required	0.24	Is the real estate owned or leased?	Owned
Square feet of facility	38,000	If leased, by whom?	n/a
Primary Contact Information			
Primary company contact name	Christina Miller	Title	
Address of company contact	1311 Sunnymede Avenue	Phone	(847) 890-5629
City, State, Zip	South Bend, IN 46615	Email	christina@daintymaid.co
Senior Official Information			
Company senior official name	n/a	Title	
Address of company contact (if different from above)		Phone	
City, State, Zip		Email	
Consultant Information/Agent			
Hired business consultant/agent name	n/a	Consultant release? (Y/N)	
Address		Local economic development partners approval? (Y/N)	
City, State, Zip		Email	
Project Overview			
Brief description of your company, project, and why the property is necessary for economic growth	<p>Our project seeks to reactivate the building known as Center City Place. This includes restoring the historic facade, doing extensive repairs and renovations and filling the building with active businesses (we already have 6+ interested businesses: some new, some relocating into South Bend).</p> <p>Our block has been largely vacant for many years, and we feel that creating an active space will help drive interest in developing other unused buildings in our immediate vicinity as well as bringing more traffic to the small businesses currently operating.</p>		
Certified Technology Park appropriate	n/a		
Is the project in a Tax Incremental Financing (TIF) area? If so, which?	River West Development Area		
Have Building Permits been issued? (Y/N) [Note-Not eligible for abatement if Yes]	No	Number of residential units created by project	4-8 rentals
If this is a petition for personal property tax abatement, has the equipment been installed?	No		

Investment Details			
Public Infrastructure needs (Off-site of project in dollars)	Has any 504 funding been received?	What is the value of any equipment being purchased in Indiana for the project?	What is the value of any equipment being purchased from out of state for the project?
n/a	no	n/a	n/a

New Project Investments								
Calendar Year	2023	2024	2025	2026	2027	2028	2029	2030
Land Acquisition								
Building Lease Payments			\$ 85,000.00					
Building Purchase Costs		\$ 15,000.00	\$ 50,000.00					
New Building Construction								
Existing Building Improvements			\$ 4,000,000.00					
New Machinery & Equipment			\$ 1,000,000.00					
Special Tooling/Retrofitting								
New Furniture/Fixtures				\$ 650,000.00				
New Computer/IT Hardware			\$ 15,000.00					
New Software				\$ 5,000.00				
On-site Rail Infrastructure								
On-site Fiber Infrastructure			\$ 20,000.00					
<b>TOTAL</b>	<b>\$ 0.00</b>	<b>\$ 15,000.00</b>	<b>\$ 5,170,000.00</b>	<b>\$ 655,000.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>

Full-Time Permanent Indiana-Resident Positions by Calendar Year						
Calendar Year	Jobs retained	Hourly average wage, w/o benefits or bonuses	Cumulative # of net NEW full time permanent jobs created at project	Hourly average wage, w/o benefits or bonuses, of cumulative net new jobs	Total training expenditure - not cumulative	Total # to be trained - not cumulative
2024			1	\$ 50.00		
2025			1	\$ 50.00		
2026			11	\$ 35.00		
2027						
2028						
2029						
2030						
2031						
2032						
2033						
2034						
2035						

Provide hourly wage information for new employees in the following positions.		
	Full time	Part time
Laborers	\$ 20.00	\$ 20.00
Technical		
Managerial	\$ 35.00	\$ 35.00
Administrative	\$ 50.00	

Who will be the individual responsible for coordinating with WorkOne on recruiting? n/a

Does your company have an EEO hiring policy? n/a Are you an EEO employer? n/a

Please list the number of full time and part time minority and/or female employees for the following years:						Please describe your commitment to diversity and inclusion by detailing your outreach and recruitment efforts for the last three years as well as current policies.
Year	2024		2023		2022	
	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time
Black						
Hispanic						
Asian						
Indian						
Female	1					
Other						

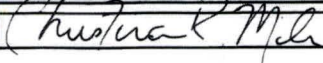
Complete the table below for Real Property Tax Abatement only.

\*\*\* Sign at the bottom for all requested incentives (real AND personal property). \*\*\*

**Public Benefit Item:**

Information is required on both the construction companies and the companies which will provide materials purchased for this project. Please complete the table below with the appropriate information. If you qualify for the points, please enter the full amount of available points.		Qualify (Yes or No)	Earned Points	Available Points	
1	<b>Construction Related (Contractors):</b>				
	A.	Employ Local Companies (75%)	Y	20	20
	B.	Purchase Materials from Local Companies (75%)	Y	20	20
	C.	Require Employees vs. Independent Contractors	Y	19	19
	D.	Require Prevailing Wage	N	0	22
	E.	Require Health Benefits	N	0	22
	F.	Require Retirement Benefits	N	0	18
	G.	Maintain Affirmative Action Plan	N	0	20
	<b>Sub-total Construction Related:</b>		59	141	
2	<b>Wage &amp; Benefit Related (Owner):</b>				
	A.	Pay Target Wage Levels	Y	33	33
	B.	Provide Health Benefits	Y	34	34
	C.	Provide Retirement Benefits	N	0	29
	D.	Provide Training	Y	28	28
	E.	Provide Child Care	N	0	15
	F.	Provide Transportation Assistance	N	0	14
	G.	Provide Employer Assisted Housing program	N	0	9
	<b>Sub-total Wage &amp; Benefit Related:</b>		95	162	
3	<b>Workforce Related:</b>				
	A.	Create New Jobs	Y	42	42
	B.	Retain Existing Jobs	Y	41	41
	C.	Maintain Affirmative Action Plan	Y	35	35
	D.	Provide Targeted Hiring Preference	N	0	34
	<b>Sub-total Workforce Related:</b>		118	152	
4	<b>Support a Municipal Facility:</b>				
	A.	Support a SB Municipal Facility (donations to the zoo, conservatory, museum, etc.)	N	0	84
	Name of Facility				
	<b>Sub-total Municipal Facility:</b>		0	84	
<b>Sub-total from Above:</b>			272	539	

The undersigned owner(s) of real property, located within the City of South Bend, hereby petition the Common Council of the City of South Bend for a real and/or personal property tax abatement consideration and pursuant to I.C., 6-1.1-12.1-1, et seq., and South Bend Municipal Code Sec. 2-76 et seq., for this petition state the above.

Submitted By:  Date: 1/7/25

For Staff Use Only Below This Line					
What is the current assessed value?	Real Property:	249,300	Personal Property:		
What is the projected assessed value?	Real Property:	3,449,300	Personal Property:		
What is the tax key number(s) for this project?	71-08-12-157-009.000-026 / 71-08-12-157-010.000-026				
What is the six digit NAICS code?					
Please attach a Google map and street view of the location.					
Please list the amount of real and personal property taxes paid for the last five years when applicable.		Real Property Taxes:	Personal Property Taxes:		
Tax Year 2023 / Pay 2024		12,699.86			
Tax Year 2022 / Pay 2023		8,353.06			
Tax Year 2021 / Pay 2022		7,739.08			
Tax Year 2020 / Pay 2021		15,753.72			
Tax Year 2019 / Pay 2020		11,815.51			
Please fill out the following Public Benefit Summary Information and add to total from above.					
			(Y or N)	Points	Points
Public Benefit Item:					
Project Related:					
5	A.	Redevelop a Site that has Special Needs	Y		49
	B.	Develop Based on Local University Research	N		35
	C.	Achieve a Physical Element of a Plan	Y		36
	Sub-total Project Related:				120
6	Super Size Projects (point values are cumulative):				
	A.	100% to 199%	Y		25
	B.	200% to 299%	Y		68
	C.	300% to 399%	Y		65
	D.	400% and Over	Y		52
Sub-total Super Size Projects:				210	
7	Pay for Municipal Infrastructure:				
	A.	Pay for Oversizing or Upgrading	N		14
	B.	Pay for 26-50% of Extension Cost	N		26
	C.	Pay for 51-75% of Extension Cost	N		39
	D.	Pay for 76-100% of Extension Cost	N		52
Sub-total Infrastructure Related:				131	
Total from Applicant Section:				272	539
Total from Staff Section:				295	461
Total Public Benefit Points:				567	1000





**STATEMENT OF BENEFITS  
REAL ESTATE IMPROVEMENTS**

State Form 51767 (R7 / 1-21)

Prescribed by the Department of Local Government Finance

2024 PAY 2025

**FORM SB-1 / Real Property**

**PRIVACY NOTICE**

Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

This statement is being completed for real property that qualifies under the following Indiana Code (*check one box*):

- Redevelopment or rehabilitation of real estate improvements (IC 6-1.1-12.1-4)
- Residentially distressed area (IC 6-1.1-12.1-4.1)

**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.
2. The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the initiation of the redevelopment or rehabilitation for which the person desires to claim a deduction.
3. To obtain a deduction, a Form 322/RE must be filed with the county auditor before May 10 in the year in which the addition to assessed valuation is made or not later than thirty (30) days after the assessment notice is mailed to the property owner if it was mailed after April 10. A property owner who failed to file a deduction application within the prescribed deadline may file an application between January 1 and May 10 of a subsequent year.
4. A property owner who files for the deduction must provide the county auditor and designating body with a Form CF-1/Real Property. The Form CF-1/Real Property should be attached to the Form 322/RE when the deduction is first claimed and then updated annually for each year the deduction is applicable. IC 6-1.1-12.1-5.1(b)
5. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/Real Property that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. IC 6-1.1-12.1-17

SECTION 1						TAXPAYER INFORMATION							
Name of taxpayer <b>RSPG Global Consulting LLC</b>													
Address of taxpayer Number and Street: <b>54739 Windingbrook Dr</b> City: <b>Mishawaka</b> State: <b>IN</b> ZIP: <b>46545</b>													
Name of contact person First Name: <b>Christina</b> Last Name: <b>Miller</b>				Telephone number				E-mail address <b>christina@daintymaid.co</b>					
SECTION 2						LOCATION AND DESCRIPTION OF PROPOSED PROJECT							
Name of designating body <b>Common Council of the City of South Bend</b>										Resolution number			
Location of property		Number and Street		City		State		ZIP		County		DLGF taxing district number	
<b>225 &amp; 229 S. Michigan Stree</b>		<b>South Bend</b>		<b>IN</b>		<b>46601</b>		<b>St. Joseph</b>		<b>026 (South Bend-Portage)</b>			
Description of real property improvements, redevelopment, or rehabilitation ( <i>use additional sheets if necessary</i> ) <b>Project seeks to reactivate the building known as Center City Place. This includes restoring the historic facade, doing extensive repairs and renovations and filling the building with active businesses.</b>										Estimated start date ( <i>month, day, year</i> ) <b>3/1/2025</b>		Estimated completion date ( <i>month, day, year</i> ) <b>12/31/2027</b>	
SECTION 3						ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT							
Current Number		Salaries		Number Retained		Salaries		Number Additional		Salaries			
								<b>11</b>		<b>800800</b>			
SECTION 4						ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT							
						REAL ESTATE IMPROVEMENTS							
						COST			ASSESSED VALUE				
Current values						0			210700				
Plus estimated values of proposed project						4000000			3200000				
Less values of any property being replaced						0			0				
Net estimated values upon completion of project						4000000			3410700				
SECTION 5						WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER							
Estimated solid waste converted ( <i>pounds</i> ) _____						Estimated hazardous waste converted ( <i>pounds</i> ) _____							
Other benefits <b>The 200 S. Michigan Street block has been largely vacant for many years, and we feel that creating an active space will help drive interest in developing other unused buildings in our immediate vicinity as well as bringing more traffic to the small businesses currently operating.</b>													
SECTION 6						TAXPAYER CERTIFICATION							
I hereby certify that the representations in this statement are true.													
Signature of authorized representative 									Date signed ( <i>month, day, year</i> ) <b>1/7/25</b>				
Printed name of authorized representative <b>Christina R. Miller</b>						Title <b>Representative</b>							

**FOR USE OF THE DESIGNATING BODY**

We find that the applicant meets the general standards in the resolution adopted or to be adopted by this body. Said resolution, passed or to be passed under IC 6-1.1-12.1, provides for the following limitations:

- A. The designated area has been limited to a period of time not to exceed     N/A     calendar years\* (see below). The date this designation expires is     12/31/2027    . *NOTE: This question addresses whether the resolution contains an expiration date for the designated area.*
- B. The type of deduction that is allowed in the designated area is limited to:  
 1. Redevelopment or rehabilitation of real estate improvements  Yes  No  
 2. Residentially distressed areas  Yes  No
- C. The amount of the deduction applicable is limited to \$     N/A    .
- D. Other limitations or conditions (specify)     N/A
- E. Number of years allowed:  Year 1  Year 2  Year 3  Year 4  Year 5 (\* see below)  
 Year 6  Year 7  Year 8  Year 9  Year 10
- F. For a statement of benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?  
 Yes  No  
 If yes, attach a copy of the abatement schedule to this form.  
 If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

We have also 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 (signature and title of authorized member of designating body)	Telephone number (      )	Date signed (month, day, year)
Printed name of authorized member of designating body	Name of designating body <b>Common Council of the City of South Bend, Indiana</b>	
Attested by (signature and title of attester)	Printed name of attester	

\* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

- A. For residentially distressed areas where the Form SB-1/Real Property was approved prior to July 1, 2013, the deductions established in IC 6-1.1-12.1-4.1 remain in effect. The deduction period may not exceed five (5) years. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. Except as provided in IC 6-1.1-12.1-18, the deduction period may not exceed ten (10) years. (See IC 6-1.1-12.1-17 below.)
- B. For the redevelopment or rehabilitation of real property where the Form SB-1/Real Property was approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. (See IC 6-1.1-12.1-17 below.)

**IC 6-1.1-12.1-17**

**Abatement schedules**

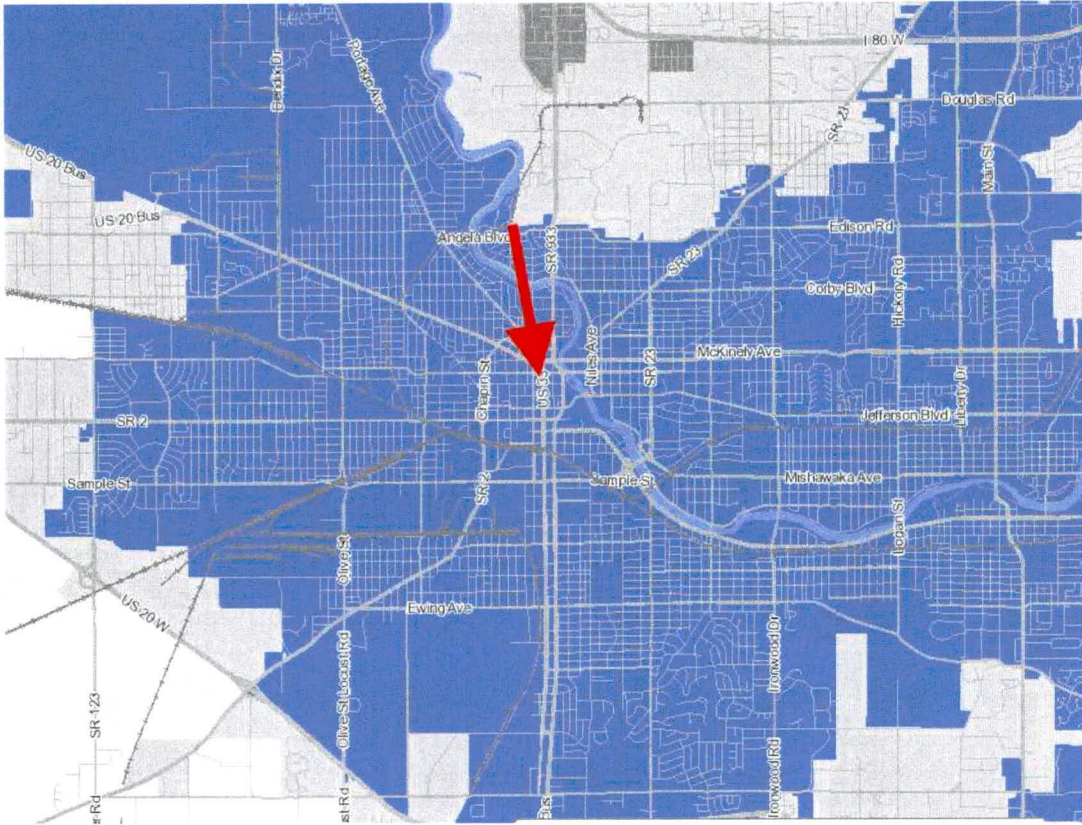
**Sec. 17. (a)** A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
- (2) The number of new full-time equivalent jobs created.
- (3) The average wage of the new employees compared to the state minimum wage.
- (4) The infrastructure requirements for the taxpayer's investment.

(b) This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. Except as provided in IC 6-1.1-12.1-18, an abatement schedule may not exceed ten (10) years.

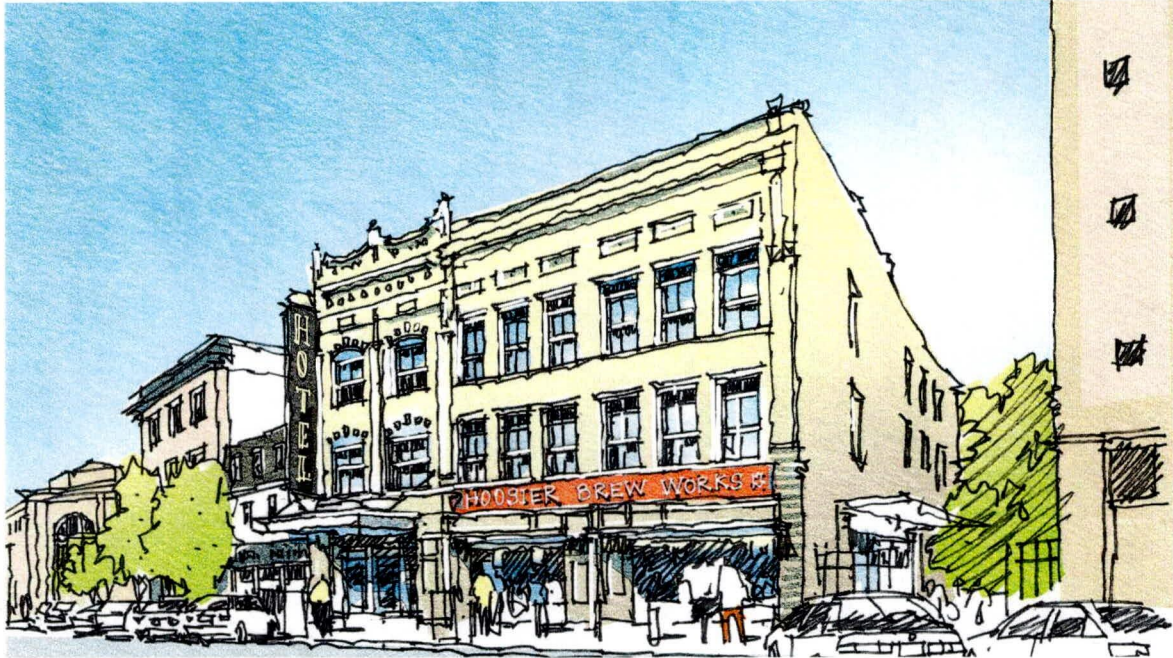
(c) An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.

# Aerial and Street Views



View Looking from S. Michigan St.







# 25-02



## CITY OF SOUTH BEND COMMUNITY INVESTMENT

Filed in Clerk's Office

JAN 08 2025

Bianca Tirado  
City Clerk, South Bend, IN

January 8, 2025

Council Member Troy Warner  
Chairperson, Community Investment Committee  
South Bend Common Council  
4<sup>th</sup> Floor, County-City Building  
South Bend, Indiana 46601

RE: **Reconfirming Resolutions (2)**: Real Property Tax Abatement and Personal Property Tax Abatement for **Greenleaf Holdco LLC**

Dear Council Member Warner,

Please find enclosed two resolutions that would reconfirm a real property tax abatement and personal property tax abatement, respectively, for Greenleaf Holdco LLC, the owner of the parcels for Pure Green Farms, located at 3820 W. Calvert Street in South Bend.

On February 14, 2022, the Common Council of South Bend adopted Confirming Resolution 4941-22, which confirmed Declaratory Resolution 4939-22 to establish a nine-year (9) real property tax abatement for an expansion project by Pure Green Farms. Also on February 14, 2022, the Common Council adopted Confirming Resolution 4945-22, which confirmed Declaratory Resolution 4944-22 to establish a five-year (5) personal property tax abatement for equipment to be purchased and installed for the expansion. The designation periods for each abatement are set to expire on January 24, 2025.

The expansion project has been delayed, and a representative of Pure Green Farms contacted the Department of Community Investment seeking support for an extension of the designation period. According to the company representative, the expansion project is scheduled to begin by mid-2025, and the previously granted tax abatements are necessary for the project to move forward.

The Reconfirming Resolutions serve two primary purposes: (1) reconfirm the Declaratory Resolution adopted in 2022 and (2) extend the designation period to the end of 2026.

A representative from Pure Green Farms will be available to meet with the Committee on Monday, January 13, 2025. If you or any of the other Council members have questions concerning the report or need additional information, please feel free to call me at (574) 235-5838.

Sincerely,

Erik Glavich  
Director, Growth and Opportunity

JAN 08 2025

Bianca Tirado  
City Clerk, South Bend, IN

**BILL NO. 25-02**  
**RESOLUTION NO. \_\_\_\_\_**

A RESOLUTION MODIFYING AND RECONFIRMING THE ADOPTION OF  
DECLARATORY RESOLUTION NO. 4939-22 DESIGNATING CERTAIN  
AREAS WITHIN THE CITY OF SOUTH BEND, INDIANA, COMMONLY  
KNOWN AS

**3820 West Calvert Street, South Bend, IN 46613**

AN ECONOMIC REVITALIZATION AREA FOR PURPOSES OF A  
NINE-YEAR (9) REAL PROPERTY TAX ABATEMENT FOR

**Greenleaf Holdco LLC**

WHEREAS, the Common Council of the City of South Bend, Indiana, has adopted a Declaratory Resolution designating certain areas within the City as Economic Revitalization Areas for the purpose of tax abatement consideration; and

WHEREAS, Declaratory Resolution No. 4939-22 designated the areas described as:

*Parcel ID:* 018-8112-4237  
*Parcel Number:* 71-08-16-400-004. 000-026  
*Leal Description:* SW SE S OF CALVERT ST 40 AC 16 37 2E

*Parcel ID:* 018-1007-0223  
*Parcel Number:* 71-08-16-400-008. 000-026  
*Legal Description:* SE SW1/4 N1271', W589', SW1349', E1175' SEC  
16-37-2E 20/21 SPLIT 32329 6/28/2019 TO 022301  
19/20 ANNEX #10625-18 10/26/18 FROM 017-  
1007-0223

as an Economic Revitalization Area under the provisions of Indiana Code 6-1.1-12.1 et seq., and South Bend Municipal Code Sections 2-76 et seq.; and

WHEREAS, upon proper notice, a public hearing was held, after which the Common Council adopted Confirming Resolution No. 4941-22 on February 14, 2022, confirming the adoption of Declaratory Resolution No. 4939-22; and

WHEREAS, the Common Council, through the adoption of Confirming Resolution No. 4941-22, provided a real property tax abatement to Greenleaf Holdco LLC for the construction of



a new commercial facility for food production at the parcels designated as an Economic Revitalization Area through the adoption of Declaratory Resolution No. 4939-22; and

WHEREAS, Pure Green Farms is an assumed business name of Greenleaf Holdco LLC as certified by the Office of the Secretary of State of the State of Indiana; and

WHEREAS, Greenleaf Holdco LLC, operating as Pure Green Farms, plants, grows, harvests, packages, and distributes lettuces grown at an existing greenhouse facility at the parcels designated as an Economic Revitalization Area through the adoption of Declaratory Resolution No. 4939-22; and

WHEREAS, Greenleaf Holdco LLC was granted a three-year (3) designation period in Confirming Resolution No. 4939-22, which will expire on January 24, 2025; and

WHEREAS, construction on the new commercial facility for food production was delayed by project development challenges and other issues outside of the control of Greenleaf Holdco LLC; and

WHEREAS, completion of the project by end of the original designation period was not possible; and

WHEREAS, the project will be completed by the end of 2026; and

WHEREAS, Greenleaf Holdco LLC has requested that the designation period confirmed by Confirming Resolution No. 4941-22 be extended; and

WHEREAS, the Common Council desires to reconfirm the designation of certain areas designated by Declaratory Resolution No. 4939-22 and confirmed by Confirming Resolution No. 4941-22 as an Economic Revitalization Area for purposes of a nine-year (9) real property tax abatement; and

WHEREAS, the Common Council desires to extend the designation period confirmed by Confirming Resolution No. 4941-22; and

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

SECTION I. The Common Council hereby reconfirms Declaratory Resolution No. 4939-22 and Confirming Resolution No. 4941-22 for purposes of a nine-year (9) real property tax abatement.

SECTION II. The designation as an Economic Revitalization Area for purposes of a nine-year (9) real property tax abatement expires on December 31, 2026.

SECTION III. The Common Council hereby determines that Greenleaf Holdco LLC is qualified and is granted property tax deduction for a period of nine (9) years as shown in Section VI of Declaratory Resolution No. 4939-22 and further determines that the petition, the Statement of Benefits, and the Memorandum of Agreement between Greenleaf Holdco LLC and the City of South Bend associated with Declaratory Resolution No. 4939-22 as adopted on January 24, 2022,

and Confirming Resolution No. 4941-22 as adopted on February 14, 2022, comply with Chapter 2, Article 6, of the Municipal Code of the City of South Bend and Indiana Code 6-1.1-12 et seq.

SECTION IV. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approved by the Mayor.

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Canneth Lee, Council President  
South Bend Common Council

Attest:

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Bianca Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana, on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_\_ o'clock \_\_\_\_\_.m.

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Bianca Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_ o'clock \_\_\_\_\_.m.

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James Mueller, Mayor  
City of South Bend

**Greenleaf Holdco LLC**

South Bend Portage Township  
 Commerical Development Real Property Tax Abatement Schedule \*

Filed in Clerk's Office

JAN 08 2025

Bianca Tirado  
 City Clerk, South Bend, IN

Type of Property: Greenhouse  
 Estimated Project Cost: \$12,000,000 Addition  
 Property Address: 3820 W. Calvert Street  
 Tax Key Number: 71-08-16-400-004.000-026; 71-08-16-400-008.000-026

	Current	Without Abatement	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9
<i>Assessed Value (AV)</i>											
Land	\$ 230,500	\$ 230,500	\$ 230,500	\$ 230,500	\$ 230,500	\$ 230,500	\$ 230,500	\$ 230,500	\$ 134,400	\$ 134,400	\$ 134,400
Structure (Current AV + 80% Project Cost)	5,179,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500
Gross Assessed Value	5,410,000	15,010,000	15,010,000	15,010,000	15,010,000	15,010,000	15,010,000	15,010,000	14,913,900	14,913,900	14,913,900
<i>Abatement</i>			100%	100%	100%	100%	100%	90%	80%	70%	60%
Abatement Deduction		-	(9,600,000)	(9,600,000)	(9,600,000)	(9,600,000)	(9,600,000)	(8,640,000)	(7,680,000)	(6,720,000)	(5,760,000)
Net Assessed Value	5,410,000	15,010,000	5,410,000	5,410,000	5,410,000	5,410,000	5,410,000	6,370,000	7,233,900	8,193,900	9,153,900
<i>Property Taxes</i>											
Assume constant tax rate of 5.3548%											
Gross Tax (Tax Rate x Net AV)	289,695	803,755	289,695	289,695	289,695	289,695	289,695	341,101	387,361	438,767	490,173
Local Tax Credit (12.3682% of GT-DS)	(33,261)	(92,281)	(33,261)	(33,261)	(33,261)	(33,261)	(33,261)	(39,163)	(44,474)	(50,376)	(56,278)
Circuit Breaker Credit	(74,321)	(204,497)	(2,264)	(2,264)	(2,264)	(2,264)	(2,264)	(2,264)	-	-	-
Taxes Due	\$ 182,113	\$ 506,977	\$ 254,170	\$ 254,170	\$ 254,170	\$ 254,170	\$ 254,170	\$ 299,674	\$ 342,887	\$ 388,391	\$ 433,895
<i>Circuit Breaker Cap</i>	161,339	449,339	449,339	449,339	449,339	449,339	449,339	449,339	447,417	447,417	447,417
Debt Service (0.3840% of Net AV)	20,774	57,638	20,774	20,774	20,774	20,774	20,774	24,461	27,778	31,465	35,151
Max Tax Under the Cap	182,113	506,977	470,113	470,113	470,113	470,113	470,113	473,800	475,195	478,882	482,568

Year	Abatement	Current Taxes Due	New Projected Tax	Combined Current & New Taxes	Taxes Abated	Net Taxes Paid
1	100%	\$ 182,113	\$ 324,864	\$ 506,977	\$ (252,807)	\$ 254,170
2	100%	182,113	324,864	506,977	(252,807)	254,170
3	100%	182,113	324,864	506,977	(252,807)	254,170
4	100%	182,113	324,864	506,977	(252,807)	254,170
5	100%	182,113	324,864	506,977	(252,807)	254,170
6	90%	182,113	324,864	506,977	(207,303)	299,674
7	80%	182,113	324,864	506,977	(164,090)	342,887
8	70%	182,113	324,864	506,977	(118,586)	388,391
9	60%	182,113	324,864	506,977	(73,082)	433,895
<b>Total:</b>		<b>1,639,021</b>	<b>2,923,776</b>	<b>4,562,797</b>	<b>(1,827,100)</b>	<b>2,735,697</b>

\* This schedule is for estimation purposes only and assumes constant tax rates equal to those for 2023 Payable 2024. The true tax values will ultimately be determined by the actual assessed valuation and the then current tax rates.



## Greenleaf Holdco LLC

*South Bend Portage Township  
Personal Property Tax Abatement Schedule \**

Estimated Equipment Cost: \$ 70,030,000  
 Asset Pool: Pool #4 (13 years and longer)  
 Property Address: 3820 W. Calvert Street  
 Tax Key Number: TBD

	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	<u>Year 5</u>
<i>Assessed Value (AV)</i>					
True Tax Value (TTV)	40%	60%	63%	54%	46%
New Base (Equipment Cost x TTV)	28,012,000	42,018,000	44,118,900	37,816,200	32,213,800
<i>Abatement</i>					
Abatement Deduction	100%	100%	100%	100%	100%
	(28,012,000)	(42,018,000)	(44,118,900)	(37,816,200)	(32,213,800)
<b>Net Assessed Value</b>	-	-	-	-	-
<i>Property Taxes</i>					
Assume constant tax rate of 5.3548%					
Gross Tax (Tax Rate x Net AV)	-	-	-	-	-
Debt Service (0.3840% of Net AV)	-	-	-	-	-
Local Tax Credit (12.3682% of GT-DS)	-	-	-	-	-
Circuit Breaker Credit	-	-	-	-	-
<b>Taxes Due</b>	\$ -	\$ -	\$ -	\$ -	\$ -
<i>Circuit Breaker Cap</i>					
	3%	3%	3%	3%	3%
	840,360	1,260,540	1,323,567	1,134,486	966,414

Year	Abatement	New Projected Tax	Taxes Abated	Net Taxes Paid
1	100%	\$ 947,926	\$ (947,926)	\$ -
2	100%	1,421,889	(1,421,889)	-
3	100%	1,492,984	(1,492,984)	-
4	100%	1,279,700	(1,279,700)	-
5	100%	1,090,115	(1,090,115)	-
<b>Years 1-5 Total:</b>		<b>6,232,614</b>	<b>(6,232,614)</b>	<b>-</b>
<i>Years 6-10 Total:</i>		3,531,025	-	3,531,025

\* This schedule is for estimation purposes only and assumes constant tax rates equal to those for 2023 Payable 2024.  
 The true tax values will ultimately be determined by the actual assessed valuation and the then current tax rates.



Department of Community Investment  
 City of South Bend



**STATEMENT OF BENEFITS  
REAL ESTATE IMPROVEMENTS**

State Form 51767 (R7 / 1-21)

Prescribed by the Department of Local Government Finance

2025 PAY 2026

FORM SB-1 / Real Property

**PRIVACY NOTICE**

Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

This statement is being completed for real property that qualifies under the following Indiana Code (*check one box*):

- Redevelopment or rehabilitation of real estate improvements (IC 6-1.1-12.1-4)
- Residentially distressed area (IC 6-1.1-12.1-4.1)

**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.
2. The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the initiation of the redevelopment or rehabilitation for which the person desires to claim a deduction.
3. To obtain a deduction, a Form 322/RE must be filed with the county auditor before May 10 in the year in which the addition to assessed valuation is made or not later than thirty (30) days after the assessment notice is mailed to the property owner if it was mailed after April 10. A property owner who failed to file a deduction application within the prescribed deadline may file an application between January 1 and May 10 of a subsequent year.
4. A property owner who files for the deduction must provide the county auditor and designating body with a Form CF-1/Real Property. The Form CF-1/Real Property should be attached to the Form 322/RE when the deduction is first claimed and then updated annually for each year the deduction is applicable. IC 6-1.1-12.1-5.1(b)
5. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/Real Property that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. IC 6-1.1-12.1-17

SECTION 1						TAXPAYER INFORMATION					
Name of taxpayer <b>Greenleaf Holdco LLC</b>											
Address of taxpayer Number and Street: <b>3820 W. Calvert Street</b> City: <b>South Bend</b> State: <b>IN</b> ZIP: <b>46613</b>											
Name of contact person First Name: <b>Joe</b> Last Name: <b>McGuire</b>				Telephone number <b>(863) 370-3154</b>				E-mail address <b>jmcguire@gopgf.com</b>			
SECTION 2						LOCATION AND DESCRIPTION OF PROPOSED PROJECT					
Name of designating body <b>Common Council of the City of South Bend</b>										Resolution number	
Location of property <b>3820 W. Calvert Street</b>		Number and Street <b>South Bend</b>		City <b>IN</b>		State <b>46613</b>		ZIP <b>St. Joseph</b>		County <b>DLGF taxing district number 026 (South Bend-Portage)</b>	
Description of real property improvements, redevelopment, or rehabilitation ( <i>use additional sheets if necessary</i> ) Continued development of 64-acre parcel of unused farmland into state-of-the-art hydroponic greenhouse complex. Expand existing 4-acre facility by adding additional vegetable growing greenhouses. Estimate between 15 to 20 more acres of the unused property can be transformed into an environmentally sustainable and aesthetically pleasing agricultural showplace and manufacturing hub that will produce and distribute fresh produce for the entire Midwest region.										Estimated start date (month, day, year) <b>4/1/2025</b>	
										Estimated completion date (month, day, year) <b>12/31/2026</b>	
SECTION 3						ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT					
Current Number <b>25</b>		Salaries <b>\$ 1,650,000</b>		Number Retained <b>25</b>		Salaries <b>\$ 1,650,000</b>		Number Additional <b>75</b>		Salaries <b>\$ 2,750,000</b>	
SECTION 4						ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT					
						<b>REAL ESTATE IMPROVEMENTS</b>					
						<b>COST</b>			<b>ASSESSED VALUE</b>		
Current values						\$ 2,270,000			\$ 5,179,500		
Plus estimated values of proposed project						\$ 12,000,000			\$ 9,600,000		
Less values of any property being replaced						\$ 0			\$ 0		
Net estimated values upon completion of project						\$ 14,270,000			\$ 14,779,500		
SECTION 5						WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER					
Estimated solid waste converted (pounds) <u>0</u>						Estimated hazardous waste converted (pounds) <u>0</u>					
Other benefits Benefits will include job development and significant technological advancements and opportunities for the region. Expansion will maximize cultivation of unused land and will establish region as a nationally recognized hub of agricultural food supply and commerce generation. Developed facilities will augment the current development of the Olive St. Road Corridor project and neighboring casino property through the availability of tourism and expanding educational opportunities for area high schools, universities, and career exploration programs. Current interest in our facility has been extremely robust and we expect it will vastly increase as the facility expands, promoting tourism. Complex will produce a variety of local, fresh vegetables while maximizing environmentally sustainable, conservation friendly, and ecologically enhancing practices.											
SECTION 6						TAXPAYER CERTIFICATION					
I hereby certify that the representations in this statement are true.											
Signature of authorized representative									Date signed (month, day, year)		
Printed name of authorized representative						Title					

**FOR USE OF THE DESIGNATING BODY**

We find that the applicant meets the general standards in the resolution adopted or to be adopted by this body. Said resolution, passed or to be passed under IC 6-1.1-12.1, provides for the following limitations:

- A. The designated area has been limited to a period of time not to exceed N/A calendar years\* (*see below*). The date this designation expires is 12/31/2026. *NOTE: This question addresses whether the resolution contains an expiration date for the designated area.*
- B. The type of deduction that is allowed in the designated area is limited to:  
 1. Redevelopment or rehabilitation of real estate improvements  Yes  No  
 2. Residentially distressed areas  Yes  No
- C. The amount of the deduction applicable is limited to \$ N/A.
- D. Other limitations or conditions (*specify*) N/A
- E. Number of years allowed:  Year 1  Year 2  Year 3  Year 4  Year 5 (\* see below)  
 Year 6  Year 7  Year 8  Year 9  Year 10
- F. For a statement of benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?  
 Yes  No  
 If yes, attach a copy of the abatement schedule to this form.  
 If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

We have also 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 of designating body</i> )	Telephone number ( )	Date signed ( <i>month, day, year</i> )
Printed name of authorized member of designating body	Name of designating body <b>Common Council of the City of South Bend, Indiana</b>	
Attested by ( <i>signature and title of attester</i> )	Printed name of attester	

\* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

- A. For residentially distressed areas where the Form SB-1/Real Property was approved prior to July 1, 2013, the deductions established in IC 6-1.1-12.1-4.1 remain in effect. The deduction period may not exceed five (5) years. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. Except as provided in IC 6-1.1-12.1-18, the deduction period may not exceed ten (10) years. (See IC 6-1.1-12.1-17 below.)
- B. For the redevelopment or rehabilitation of real property where the Form SB-1/Real Property was approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. (See IC 6-1.1-12.1-17 below.)

**IC 6-1.1-12.1-17  
Abatement schedules**

**Sec. 17. (a)** A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
- (2) The number of new full-time equivalent jobs created.
- (3) The average wage of the new employees compared to the state minimum wage.
- (4) The infrastructure requirements for the taxpayer's investment.

**(b)** This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. Except as provided in IC 6-1.1-12.1-18, an abatement schedule may not exceed ten (10) years.

**(c)** An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.



**STATEMENT OF BENEFITS  
PERSONAL PROPERTY**

State Form 51764 (R5 / 1-21)

Prescribed by the Department of Local Government Finance

**FORM SB-1 / PP**

**PRIVACY NOTICE**

Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

**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.
2. The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the installation of qualifying abatable equipment for which the person desires to claim a deduction.
3. To obtain a deduction, a person must file a certified deduction schedule with the person's personal property return on a certified deduction schedule (Form 103-ERA) with the township assessor of the township where the property is situated or with the county assessor if there is no township assessor for the township. The 103-ERA must be filed between January 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 is installed and fully functional, unless a filing extension has been obtained. A person who obtains a filing extension must file the form between January 1 and the extended due date of that year.
4. Property owners whose Statement of Benefits was approved, must submit Form CF-1/PP annually to show compliance with the Statement of Benefits. (IC 6-1.1-12.1-5.6)
5. For a Form SB-1/PP that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/PP that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. (IC 6-1.1-12.1-17)

SECTION 1 TAXPAYER INFORMATION											
Name of taxpayer <b>Greenleaf Holdco LLC dba Pure Green Farms</b>					Name of contact person First Name: <b>Joe</b> Last Name: <b>McGuire</b>						
Address of taxpayer Number and Street <b>3820 W. Calvert Street</b>		City <b>South Bend</b>		State <b>IN</b>	ZIP <b>46613</b>	Telephone number <b>(863) 370-3154</b>		Email <b>jmcguire@gopgf.com</b>			
SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT											
Name of designating body <b>Common Council of the City of South Bend</b>						Resolution number (s)					
Location of property Number and Street <b>3820 W. Calvert Street</b>		City <b>South Bend</b>		State <b>IN</b>	ZIP <b>46613</b>	County <b>St. Joseph</b>		DLGF taxing district number <b>026 (South Bend-Portage)</b>			
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.)  <b>Refer to supplemental sheet</b>						ESTIMATED					
								START DATE		COMPLETION DATE	
						Manufacturing Equipment		4/1/2025		12/31/2026	
						R & D Equipment					
						Logist Dist Equipment					
IT Equipment		4/1/2025		12/31/2026							
SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT											
Current Number <b>25</b>		Salaries <b>\$ 1,650,000</b>		Number Retained <b>25</b>		Salaries <b>\$ 1,650,000</b>		Number Additional <b>75</b>		Salaries <b>\$ 2,750,000</b>	
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			\$ 21,000,000						\$ 80,000		
Plus estimated values of proposed project			\$ 70,000,000						\$ 30,000		
Less values of any property being replaced											
Net estimated values upon completion of project			\$ 91,000,000		\$ 0		\$ 0		\$ 110,000		
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER											
Estimated solid waste converted (pounds) <b>0</b>					Estimated hazardous waste converted (pounds) <b>0</b>						
Other benefits: <b>Refer to supplemental sheet</b>											
SECTION 6 TAXPAYER CERTIFICATION											
I hereby certify that the representations in this statement are true.											
Signature of authorized representative							Date signed (month, day, year)				
Printed name of authorized representative					Title						

**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   N/A   calendar years \* (see below). The date this designation expires is   12/31/2026  . NOTE: This question addresses whether the resolution contains an expiration date for the designated area.

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

1. Installation of new manufacturing equipment;	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Enhanced Abatement per IC 6-1.1-12.1-18 Check box if an enhanced abatement was approved for one or more of these types.
2. Installation of new research and development equipment;	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
3. Installation of new logistical distribution equipment.	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
4. Installation of new information technology equipment;	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	

C. The amount of deduction applicable to new manufacturing equipment is limited to \$   N/A   cost with an assessed value of \$   N/A  . (One or both lines may be filled out to establish a limit, if desired.)

D. The amount of deduction applicable to new research and development equipment is limited to \$   N/A   cost with an assessed value of \$   N/A  . (One or both lines may be filled out to establish a limit, if desired.)

E. The amount of deduction applicable to new logistical distribution equipment is limited to \$   N/A   cost with an assessed value of \$   N/A  . (One or both lines may be filled out to establish a limit, if desired.)

F. The amount of deduction applicable to new information technology equipment is limited to \$   N/A   cost with an assessed value of \$   N/A  . (One or both lines may be filled out to establish a limit, if desired.)

G. Other limitations or conditions (specify)   N/A  

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 is allowed for:

<input type="checkbox"/> Year 1	<input type="checkbox"/> Year 2	<input type="checkbox"/> Year 3	<input type="checkbox"/> Year 4	<input checked="" type="checkbox"/> Year 5	<input type="checkbox"/> Enhanced Abatement per IC 6-1.1-12.1-18 Number of years approved: _____ (Enter one to twenty (1-20) years; may not exceed twenty (20) years.)
<input type="checkbox"/> Year 6	<input type="checkbox"/> Year 7	<input type="checkbox"/> Year 8	<input type="checkbox"/> Year 9	<input type="checkbox"/> Year 10	

I. For a Statement of Benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?  Yes  No  
If yes, attach a copy of the abatement schedule to this form.  
If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

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 by: (signature and title of authorized member of designating body)	Telephone number (    )	Date signed (month, day, year)
Printed name of authorized member of designating body	Name of designating body Common Council of the City of South Bend, Indiana	
Attested by: (signature and title of attester)	Printed name of attester	

\* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

**IC 6-1.1-12.1-17**

**Abatement schedules**

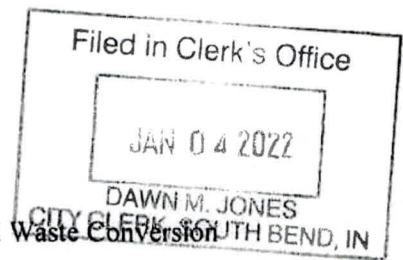
**Sec. 17. (a)** A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
- (2) The number of new full-time equivalent jobs created.
- (3) The average wage of the new employees compared to the state minimum wage.
- (4) The infrastructure requirements for the taxpayer's investment.

**(b)** This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. Except as provided in IC 6-1.1-12.1-18, an abatement schedule may not exceed ten (10) years.

**(c)** An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.





Pure Green Farms Supplemental Sheet  
Form SB-1/PP Section 2: Description of Manufacturing Equipment and Waste Conversion Benefits

Our current location in South Bend is situated strategically and employs advanced technology to promote a safe and sustainable environment in which to grow its leafy greens (additional vegetable/fruit varieties are being researched). With the use of sun and minimal reliance on artificial light, energy efficiency is maximized. The current site rests on a 64-acre purchased parcel that can potentially expand up to 300 acres.

The growing and packing systems are the most advanced in the industry, allowing for very minimal human hands touching the product. Robotics, sensors and video technology are installed throughout the greenhouse and the harvesting area. This streamlines our farm to table process and gives our customers peace of mind that they are getting their greens safely and sooner for a better-quality experience.

The current (and all future additional) greenhouses deploy advanced automated growing systems that control and regulate all processing, growing, harvesting and production evolutions in the produce cycle. The greenhouse uses innovative climate management technologies to monitor and control the heating, the lighting, the air movement, general atmosphere, and concentration of CO<sub>2</sub>.

Multiple screens in the greenhouse growing enclosures help manage light and temperature. The operations are also economically sustainable, utilizing recycling and using an estimated 90% less water compared to field grown lettuce or operating in a fully pest free environment.

As the greens grow, automated gutters move and adjust to allow for increased spacing between plants. This helps the company achieve space efficiency throughout the facility. Labor efficiency is also significantly improved through Pure Green's automatic seeding, harvesting, and packing technology.

Food safety is also top of mind at Pure Green. The indoor farm environment is pesticide-free and uses less water, meaning Pure Green's products are fresh, crisp, and offer the buy-side a long shelf life. Unique, high-quality varieties distributed to a select region maximize natural resources and minimize shrink and overall waste.

## MEMORANDUM OF AGREEMENT

### (REAL PROPERTY TAX ABATEMENT)

This Memorandum of Agreement (Agreement) dated as of January 7, 2025, serves as confirmation of a commitment by **Greenleaf Holdco LLC** (the “Applicant”), pending a January 13, 2025, public hearing, to comply with the project description, job creation and retention (and associated wage rates and salaries) figures contained in its petition, Statement of Benefits, and attachments and this Agreement.

1. Property Associated with the Abatement and Responsibilities of the Applicant. At the time of this Agreement, the property is located at 3820 West Calvert Street, South Bend, Indiana 46613, and has Key Numbers 71-08-16-400-004.000-026 and 71-08-16-400-008.000-026. Throughout the duration of the abatement, the Applicant shall promptly report any changes in the address or Key Number of the property receiving the abatement to the Department of Community Investment and to the Office of the City Clerk. Moreover, the Applicant also shall report any material changes or improvements made to the property subject to the abatement including changes as the result of subdividing, replatting, or otherwise. The Applicant agrees that failure to promptly report changes can result in a finding of noncompliance on behalf of the Applicant under the commitments of this Agreement.

2. Commitments of City and Applicant. Subject to the adoption of a Declaratory Resolution and a Confirmatory Resolution by the South Bend Common Council (the “SBCC”), the City of South Bend, Indiana, (the “City”) commits to provide a **nine-year (9) real property tax abatement** for the Applicant, based on the Applicant’s commitment set forth in its Application. The Applicant commits to the following (the “Commitments”):

(a) making total combined real property expenditures of no less than Twelve Million Dollars (\$12,000,000.00) for the construction of a new structure covering approximately 65 acres at property identified in Section 1 of this Agreement;

(b) retaining twenty-five (25) permanent full-time jobs with a total estimated annual payroll of \$1,650,000 and creating at least seventy-five (75) permanent full-time jobs with a total estimated annual payroll of \$2,750,000 within the first three years of the tax abatement. During the first year of the abatement, the Applicant’s lowest paid permanent full-time employee shall be compensated at an hourly rate of at least Fifteen Dollars (\$15.00) per hour (“Minimum Wage Rate”), and, in all subsequent years of the abatement, the Minimum Wage Rate of the Applicant shall increase by at least two percent (2%) over the previous year.

(c) acting in good faith to complete the project as described in its Application.

3. Applicant’s Compliance with City and State Laws. During the term of the abatement, the Applicant shall comply with Chapter 2, Article 6, of the South Bend Municipal Code, entitled “Tax Abatement Procedures,” and all governing provisions of the Indiana Code. During the term of this abatement, the City may annually request information from the Applicant concerning the nature of the Project, the approved capital expenditure of the Project, the number of full-time permanent positions

newly created by the Project, and the average wage rates and salaries (excluding benefits & overtime) associated with the positions, and the Applicant shall provide the City with adequate written evidence thereof within fifteen (15) days of such request (the "Annual Survey"). The City shall utilize this information and the information required to be filed by the Applicant in the CF-1 Compliance with the Statement of Benefits form to verify that the Applicant has at all times complied with the Commitments after the Commitment Date and during the duration of the abatement and for no other purpose. The Applicant further agrees to provide the City with such additional information as requested by the City to determine Applicant's compliance with the Commitments and with local and state requirements within twenty (20) days following any such request. Notwithstanding anything herein to the contrary, the Applicant acknowledges that the City may be required to disclose certain documents provided by the Applicant as required by a court order or applicable law.

4. Substantial Compliance and Rights of Termination. The City, by and through the SBCC, reserves the right to terminate the Economic Revitalization Area designation and associated property tax abatement deductions if it reasonably determines that the Applicant has not made reasonable efforts to substantially comply with all the Commitments, as defined in Section 2 of this Agreement, and the Applicant's failure to substantially comply with the Commitments was not due to factors beyond its reasonable control, as described in Section 5 below.

5. Factors Beyond Control. As used in this Agreement, factors beyond the control of the Applicant shall only include factors not reasonably foreseeable at the time of designation application and submission of Statement of Benefits which are not caused by any act or omission of the Applicant, and which materially and adversely affect the ability of the Applicant to substantially comply with this Agreement. Applicant has the burden to communicate to the City any such factors in which it believes is beyond its control and impacting its ability to fulfill the terms of this Agreement or any tax abatement benefit provided to the City. The City reserves the right to investigate the factors cited by Applicant under this Section 5 to the fullest extent possible and may deny Applicant's request upon the completion of the City's investigation.

6. Repayment of Tax Abatement Savings. If at any time during the term of this Agreement the Applicant shall: (a) be delinquent or in default with respect to any tax payment in St. Joseph County, Indiana; or (b) cease operations at the facility for which the tax abatement was granted; or (c) announce the cessation of operations at such facility, then the City may immediately terminate the Economic Revitalization Area designation and associated tax abatement deductions, and upon such termination, require Applicant to repay all of the tax abatement savings received through the date of such termination.

7. Notice/Hearing of Termination. In the event that the City determines that the Economic Revitalization Area designation and associated tax abatement deductions should be terminated or that all or a portion of the tax abatement savings should be repaid, it will give the Applicant notice of such determination, including a written statement calculating the amount due from the Applicant, and will provide the Applicant with an opportunity to meet with the City's designated representatives to show cause why the abatement should not be terminated and/or the tax savings repaid. Such notice shall state the names of the person with whom the Applicant may meet and will provide that the Applicant shall have thirty (30) days from the date of such notice to arrange such meeting and to provide its evidence concerning why the abatement termination and/or tax savings repayment should not occur.

If, after giving such notice and receiving such evidence, if any, the City determines that the abatement termination and/or the tax repayment action is proper, the Applicant shall be provided with written notice and a hearing before the SBCC before any final action shall be taken terminating the abatement and/or requiring repayment of tax benefits. The Applicant shall be entitled to appeal that determination to a St. Joseph County Superior or Circuit Court.

8. Repayment. In the event the City requires repayment of the tax abatement savings as provided hereunder, it shall provide Applicant with a written statement calculating the amount due (the “Statement”), and Applicant shall make such repayment to the City within one hundred twenty (120) days of the date of the Statement. If the Applicant does not make timely repayment, the City shall be entitled to all reasonable costs and attorneys’ fees incurred in the enforcement of this Agreement and the collection of the tax abatement savings required to be repaid hereunder.

9. Voidance of Previous Agreement. This Agreement supersedes the Memorandum of Agreement dated March 10, 2022, as agreed to by the Applicant and the City.

10. Modification/Entire Agreement. This Agreement and the schedules attached hereto as Exhibit A contain the entire understanding between the City and the Applicant with respect to the subject matter hereof, and supersede all prior and contemporaneous agreements and understandings, inducements, and conditions, expressed or implied, oral, or written, except as herein contained. This Agreement may not be modified or amended other than by an agreement in writing signed by the City and the Applicant. The Applicant understands that any and all filings required to be made or actions required to be taken to initiate or maintain the abatement are solely the responsibility of the Applicant.

11. Waivers. Neither the failure nor any delay on the part of the City to exercise any right, remedy, power, or privilege under this Agreement shall operate as a waiver thereof, nor shall any single or partial exercise of any right, remedy, power, or privilege preclude any other or further exercise of the same or of any other right, remedy, power, or privilege with respect to any occurrence or be construed as a waiver of such right, remedy, power, or privilege with respect to any other occurrence. No waiver shall be effective unless it is in writing and is signed by the party asserted to have granted such waiver.

12. Notices. All notices, requests, demands, and other communications required or permitted under this Agreement shall be in writing and shall be deemed to have been received when delivered by hand or by facsimile (with confirmation by registered or certified mail) or on the third business day following the mailing, by registered or certified mail, postage prepaid, return receipt requested, thereof, addressed as set forth below:

If to Applicant:	Greenleaf Holdco, LLC 3820 W. Calvert St, South Bend, Indiana 46613 Attn: Joe McGuire
If to the City:	City of South Bend, Indiana 227 W. Jefferson Boulevard, Suite 1400S South Bend, Indiana 46601 Attn: Executive Director of Community Investment

13. Governing Laws of Indiana. This Agreement and all questions relating to its validity, interpretation, performance, and enforcement shall be governed by the laws and decisions of the courts of the State of Indiana.

14. Applicant's Consent to Jurisdiction. The Applicant hereby irrevocably consents to the jurisdiction of the Courts of the State of Indiana and of the St. Joseph County Circuit or Superior Court in connection with any action or proceeding arising out of or relating to this Agreement or any documents or instrument delivered with respect to any of the obligations hereunder, and any action related to this Agreement shall be brought in such County and in such Court.

15. Assignment and Transfer Prohibited. This Agreement shall be binding upon and inure to the benefit of the City and the Applicant and their successors and assigns, except (a) that no party may assign or transfer its rights or obligations under this Agreement without the prior written consent of the other party hereto, in which consent shall not be unreasonably withheld, and (b) Applicant may assign and transfer its rights under this Agreement to the Permitted Assign without prior written consent. "Permitted Assign" means the affiliated single purpose entity created for purposes of designing, constructing, owning, operating, and maintaining the project which is the subject of this Agreement.

16. Valid and Binding Agreement. This Agreement may be executed in any number of counterparts, each of which shall be deemed to be an original as against any party whose signature appears thereon, and all of which shall together constitute one and the same instrument. By executing this Agreement, each person so executing affirms that he has been duly authorized to execute this Agreement on behalf of such party and that this Agreement constitutes a valid and binding obligation of the party.

17. Severability. The provisions of this Agreement and of each section or other subdivision herein are independent of and separable from each other, and no provision shall be affected or rendered invalid or unenforceable by virtue of the fact that for any reason any other or others of them may be invalid or unenforceable in whole or in part unless this Agreement is rendered totally unenforceable thereby.

18. No Personal Liability. No official, director, officer, employee, or agent of the City shall be charged personally by the Applicant, its employees, or its agents with any liabilities or expenses of defense or be held personally liable to the Applicant under any term or provision of this Agreement or because of the execution by such party of this Agreement or because of any default by such party hereunder.

**[Remainder of page intentionally blank.]**

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year first above written.

<p>“Applicant”</p> <p>Greenleaf Holdco, LLC</p> <p>By: _____</p> <p>Joe McGuire Chief Executive Officer</p> <p>Approved as to Legal Adequacy and Form this _____ day of _____, 2025.</p> <p>Counsel, South Bend Common Council</p>	<p>“City”</p> <p>City of South Bend, Indiana</p> <p>By: _____</p> <p>Sharon McBride President, South Bend Common Council</p> <p>By: _____</p> <p>Troy Warner Chairperson, Community Investment Committee</p>
<p>Counsel for Applicant</p>	<p>By: _____</p> <p>Erik Glavich Department of Community Investment</p>
	<p>By: _____</p> <p>James Mueller Mayor</p>

**EXHIBIT A**

**Abatement Schedule**

Subject to the adoption by the SBCC of a resolution reconfirming the adoption of Declaratory Resolution No. No. 4939-22, the property owner is qualified for and is granted a real property tax abatement for a period of nine (9) years as shown by the schedule outlined below.

Year 1 - 100%  
Year 2 - 100%  
Year 3 - 100%  
Year 4 - 100%  
Year 5 - 100%  
Year 6 - 90%  
Year 7 - 80%  
Year 8 - 70%  
Year 9 - 60%

## MEMORANDUM OF AGREEMENT

### (PERSONAL PROPERTY TAX ABATEMENT)

This Memorandum of Agreement (Agreement) dated as January 7, 2025, serves as confirmation of a commitment by **Greenleaf Holdco LLC** (the “Applicant”), pending a January 13, 2025, public hearing, to comply with the project description, job creation, and retention (and associated wage rates and salaries) figures contained in its petition, Statement of Benefits, and attachments and this Agreement (Commitments).

1. Commitments of City and Applicant. Subject to the adoption of a Declaratory Resolution and a Confirmatory Resolution by the South Bend Common Council (the “SBCC”), the City of South Bend, Indiana, (the “City”) commits to provide a **five-year (5) personal property tax abatement** for the Applicant, based on the Applicant’s commitment set forth in its Application. The Applicant commits to the following (the “Commitments”):

(a) making a capital expenditure of no less than Sixty-Eight Million Dollars (\$68,000,000.00) associated with the purchase of new logistical distribution equipment for Greenleaf Holdco located at 3820 W Calvert Street, South Bend, IN 46613, and has Key Numbers 71-08-16-400-004.000-026 and 71-08-16-400-008.000-026.

(b) retaining twenty-five (25) permanent full-time jobs with a total estimated annual payroll of \$1,650,000 and creating at least seventy-five (75) permanent full-time jobs with a total estimated annual payroll of \$2,750,000 within the first three years of the tax abatement. During the first year of the abatement, the Applicant's lowest paid permanent full-time employee shall be compensated at an hourly rate of at least Fifteen Dollars (\$15.00) per hour ("Minimum Wage Rate"), and, in all subsequent years of the abatement, the Minimum Wage Rate of the Applicant shall increase by at least two percent (2%) over the previous year.

(c) acting in good faith to complete the project as described in its Application.

2. Applicant’s Compliance with City and State Laws. During the term of the abatement, the Applicant shall comply with Chapter 2, Article 6, of the South Bend Municipal Code, entitled “Tax Abatement Procedures,” and all governing provisions of the Indiana Code. During the term of this abatement, the City may annually request information from the Applicant concerning the nature of the Project, the approved capital expenditure of the Project, the number of full-time permanent positions newly created by the Project, and the average wage rates and salaries (excluding benefits & overtime) associated with the positions, and the Applicant shall provide the City with adequate written evidence thereof within fifteen (15) days of such request (the “Annual Survey”). The City shall utilize this information and the information required to be filed by the Applicant in the CF-1 Compliance with the Statement of Benefits form to verify that the Applicant has at all times complied with the Commitments after the Commitment Date and during the duration of the abatement and for no other purpose. The Applicant further agrees to provide the City with such additional information as requested by the City to determine Applicant’s compliance with the Commitments and with local and state requirements within twenty (20) days following any such request. Notwithstanding anything herein to the contrary, the Applicant acknowledges that the City may be required to disclose certain documents provided by the Applicant as required by a court order or applicable law.



3. Substantial Compliance and Rights of Termination. The City, by and through the SBCC, reserves the right to terminate the Economic Revitalization Area designation and associated property tax abatement deductions if it reasonably determines that the Applicant has not made reasonable efforts to substantially comply with all the Commitments, as defined in Section 1 of this Agreement, and the Applicant's failure to substantially comply with the Commitments was not due to factors beyond its reasonable control, as described in Section 4 below.

4. Factors Beyond Control. As used in this Agreement, factors beyond the control of the Applicant shall only include factors not reasonably foreseeable at the time of designation application and submission of Statement of Benefits which are not caused by any act or omission of the Applicant, and which materially and adversely affect the ability of the Applicant to substantially comply with this Agreement. Applicant has the burden to communicate to the City any such factors in which it believes is beyond its control and impacting its ability to fulfill the terms of this Agreement or any tax abatement benefit provided to the City. The City reserves the right to investigate the factors cited by Applicant under this Section 4 to the fullest extent possible and may deny Applicant's request upon the completion of the City's investigation.

5. Repayment of Tax Abatement Savings. If at any time during the term of this Agreement the Applicant shall: (a) be delinquent or in default with respect to any tax payment in St. Joseph County, Indiana; or (b) cease operations at the facility for which the tax abatement was granted; or (c) announce the cessation of operations at such facility, then the City may immediately terminate the Economic Revitalization Area designation and associated tax abatement deductions, and upon such termination, require Applicant to repay all of the tax abatement savings received through the date of such termination.

6. Notice/Hearing of Termination. In the event that the City determines that the Economic Revitalization Area designation and associated tax abatement deductions should be terminated or that all or a portion of the tax abatement savings should be repaid, it will give the Applicant notice of such determination, including a written statement calculating the amount due from the Applicant, and will provide the Applicant with an opportunity to meet with the City's designated representatives to show cause why the abatement should not be terminated and/or the tax savings repaid. Such notice shall state the names of the person with whom the Applicant may meet and will provide that the Applicant shall have thirty (30) days from the date of such notice to arrange such meeting and to provide its evidence concerning why the abatement termination and/or tax savings repayment should not occur. If, after giving such notice and receiving such evidence, if any, the City determines that the abatement termination and/or the tax repayment action is proper, the Applicant shall be provided with written notice and a hearing before the SBCC before any final action shall be taken terminating the abatement and/or requiring repayment of tax benefits. The Applicant shall be entitled to appeal that determination to a St. Joseph County Superior or Circuit Court.

7. Repayment. In the event the City requires repayment of the tax abatement savings as provided hereunder, it shall provide Applicant with a written statement calculating the amount due (the "Statement"), and Applicant shall make such repayment to the City within one hundred twenty (120) days of the date of the Statement. If the Applicant does not make timely repayment, the City shall be entitled to all reasonable costs and attorneys' fees incurred in the enforcement of this Agreement and the collection of the tax abatement savings required to be repaid hereunder.

8. Voidance of Previous Agreement. This Agreement supersedes the Memorandum of Agreement dated March 10, 2022, as agreed to by the Applicant and the City.

9. Modification/Entire Agreement. This Agreement and the schedules attached hereto as Exhibit A contain the entire understanding between the City and the Applicant with respect to the subject matter hereof, and supersede all prior and contemporaneous agreements and understandings, inducements, and conditions, expressed or implied, oral, or written, except as herein contained. This Agreement may not be modified or amended other than by an agreement in writing signed by the City and the Applicant. The Applicant understands that any and all filings required to be made or actions required to be taken to initiate or maintain the abatement are solely the responsibility of the Applicant.

10. Waivers. Neither the failure nor any delay on the part of the City to exercise any right, remedy, power, or privilege under this Agreement shall operate as a waiver thereof, nor shall any single or partial exercise of any right, remedy, power, or privilege preclude any other or further exercise of the same or of any other right, remedy, power, or privilege with respect to any occurrence or be construed as a waiver of such right, remedy, power, or privilege with respect to any other occurrence. No waiver shall be effective unless it is in writing and is signed by the party asserted to have granted such waiver.

11. Governing Laws of Indiana. This Agreement and all questions relating to its validity, interpretation, performance, and enforcement shall be governed by the laws and decisions of the courts of the State of Indiana.

12. Applicant's Consent to Jurisdiction. The Applicant hereby irrevocably consents to the jurisdiction of the Courts of the State of Indiana and of the St. Joseph County Circuit or Superior Court in connection with any action or proceeding arising out of or relating to this Agreement or any documents or instrument delivered with respect to any of the obligations hereunder, and any action related to this Agreement shall be brought in such County and in such Court.

13. Notices. All notices, requests, demands, and other communications required or permitted under this Agreement shall be in writing and shall be deemed to have been received when delivered by hand or by facsimile (with confirmation by registered or certified mail) or on the third business day following the mailing, by registered or certified mail, postage prepaid, return receipt requested, thereof, addressed as set forth below:

If to Applicant:	Greenleaf Holdco, LLC 3820 W Calvert St, South Bend, IN 46613  Attn: Joe McGuire, CEO

If to the City:	City of South Bend, Indiana 227 W. Jefferson Boulevard, Suite 1400S South Bend, Indiana 46601  Attn: Executive Director of Community Investment
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14. Assignment and Transfer Prohibited. This Agreement shall be binding upon and inure to the benefit of the City and the Applicant and their successors and assigns, except that no party may assign or transfer its rights or obligations under this Agreement without the prior written consent of the other party hereto, in which consent shall not be unreasonably withheld.

15. Valid and Binding Agreement. This Agreement may be executed in any number of counterparts, each of which shall be deemed to be an original as against any party whose signature appears thereon, and all of which shall together constitute one and the same instrument. By executing this Agreement, each person so executing affirms that he has been duly authorized to execute this Agreement on behalf of such party and that this Agreement constitutes a valid and binding obligation of the party.

16. Severability. The provisions of this Agreement and of each section or other subdivision herein are independent of and separable from each other, and no provision shall be affected or rendered invalid or unenforceable by virtue of the fact that for any reason any other or others of them may be invalid or unenforceable in whole or in part unless this Agreement is rendered totally unenforceable thereby.

17. No Personal Liability. No official, director, officer, employee, or agent of the City shall be charged personally by the Applicant, its employees, or its agents with any liabilities or expenses of defense or be held personally liable to the Applicant under any term or provision of this Agreement or because of the execution by such party of this Agreement or because of any default by such party hereunder.

**[Remainder of page intentionally blank.]**

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year first above written.

<p>“Applicant”</p> <p>Greenleaf Holdco LLC</p> <p>By: _____</p> <p>Joe McGuire Chief Executive Officer</p> <p>Approved as to Legal Adequacy and Form this _____ day of _____, 2025.</p> <p>Counsel, South Bend Common Council</p>	<p>“City”</p> <p>City of South Bend, Indiana</p> <p>By: _____</p> <p>Sharon McBride President, South Bend Common Council</p> <p>By: _____</p> <p>Troy Warner Chairperson, Community Investment Committee</p> <p>By: _____</p> <p>Erik Glavich Department of Community Investment</p> <p>By: _____</p> <p>James Mueller Mayor</p>
<p>Counsel for Applicant</p>	

**EXHIBIT A**

**Abatement Schedule**

Subject to the adoption by the SBCC of a resolution reconfirming the adoption of Declaratory Resolution No. No. 4944-22, the property owner is qualified for and is granted a personal property tax abatement for a period of five (5) years as shown by the schedule outlined below.

Year 1 - 100%  
Year 2 - 100%  
Year 3 - 100%  
Year 4 - 100%  
Year 5 - 100%

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# RESOLUTION

No. 4939-22

Passed by the Common Council of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ January 24, 20 22 .

Attest: *Dawn M. Jones* \_\_\_\_\_ City Clerk  
Dawn M. Jones

Attest: *Sharon L. McBride* \_\_\_\_\_ President of Common Council

Presented by me to the Mayor of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ January 25, 20 22 .

*Dawn M. Jones* \_\_\_\_\_ City Clerk  
Dawn M. Jones

Approved and signed by me \_\_\_\_\_ January 26, 20 22 .

\_\_\_\_\_ *J. M. H.* \_\_\_\_\_ Mayor

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**BILL NO. 22-04**

**RESOLUTION NO. 4939-22**

**A RESOLUTION OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND  
DESIGNATING CERTAIN AREAS WITHIN THE CITY OF SOUTH BEND, INDIANA,  
COMMONLY KNOWN AS 3820 W CALVERT STREET, SOUTH BEND IN 46613 AN  
ECONOMIC REVITALIZATION AREA FOR PURPOSES OF A NINE (9) YEAR REAL  
PROPERTY TAX ABATEMENT FOR GREENLEAF HOLDCO**

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WHEREAS, a petition for real property tax abatement has been filed with the City Clerk for consideration by the Common Council of the City of South Bend, Indiana requesting that the area located at 3820 W Calvert Street, South Bend IN 46613, which is more particularly described as:

*Parcel ID: 018-8112-4237*  
*Parcel Number: 71-08-16-400-004.000-026*  
*Leal Description: SW SE S OF CALVERT ST 40 AC 16 37 2E*

*Parcel ID: 018-1007-0223*  
*Parcel Number: 71-08-16-400-008.000-026*  
*Legal Description: SE SW1/4 N1271', W589', SW1349', E1175' Sec 16-37-2e 20/21 Split 32329 6/28/2019 to 022301 19/20 ANNEX #10625-18 10/26/18 from 017-1007-0223*

and which has Key Numbers 018-8112-4237 and 018-1007-0223 be designated as an Economic Revitalization Area under the provisions of Indiana Code § 6-1.1-12.1 et seq., and South Bend Municipal Code Sections 2-76 et seq., and;

WHEREAS, petitioner has agreed to and has accepted responsibility to report any changes in the final legal description and to report the final, appropriate Key Number to the Department of Community Investment and to the Office of the City Clerk; and

WHEREAS, the Department of Community Investment has concluded an investigation and prepared a report with information sufficient for the Common Council to determine that the area qualifies as an Economic Revitalization Area under Indiana Code § 6-1.1-12.1, et seq., and South Bend Municipal Code Sections 2-76, et seq., and has further prepared maps and plats showing the boundaries and such other information regarding the area in question as required by law; and

WHEREAS, the Community Investment Committee of the Common Council has reviewed said report and recommended to the Common Council that the area qualifies as an Economic Revitalization Area.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

SECTION I. The Common Council hereby determines and finds that the Petition for Real Property Tax Abatement and the Statement of Benefits form completed by the Petitioner meet the requirements of Indiana Code § 6-1.1-12.1 et seq., for tax abatement.

SECTION II. The Common Council hereby determines and finds the following:

- A. That the description of the proposed redevelopment or rehabilitation meets the applicable standards for such development;
- B. That the estimate of the value of the redevelopment or rehabilitation is reasonable for projects of this nature;
- C. That the estimate of the number of individuals who will be employed or whose employment will be retained by the Petitioner can reasonably be expected to result from the

proposed described redevelopment or rehabilitation;

D. That the estimate of the annual salaries of those individuals who will be employed or whose employment will be retained by the Petitioner can be reasonably expected to result from the proposed redevelopment or rehabilitation;

E. That the other benefits about which information was requested are benefits that can be reasonably expected to result from the proposed described redevelopment or rehabilitation; and

F. That the totality of benefits is sufficient to justify the requested deduction, all of which satisfy the requirements of Indiana Code § 6-1.1-12.1-3.

SECTION III. The Common Council hereby determines and finds that the proposed described redevelopment or rehabilitation can be reasonably expected to yield benefits identified in the Statement of Benefits, Sections 1 through 3 of the Petition for Real Property Tax Abatement Consideration and the Memorandum of Agreement between the Petitioner and the City of South Bend, and that the Statement of Benefits form completed by the petitioner, said form being prescribed by the State Board of Accounts, are sufficient to justify the deduction granted under Indiana Code § 6-1.1-12.1-3.

SECTION IV. The Common Council hereby accepts the report and recommendation of the Community Investment Committee that the area herein described be designated as an Economic Revitalization Area and hereby adopts a Resolution designating this area as an Economic Revitalization Area for purposes of real property tax abatement.

SECTION V. The designation as an Economic Revitalization Area shall be limited to three (3) calendar years from the date of the adoption of this Resolution by the Common Council.

SECTION VI. The Common Council hereby determines that the property owner is qualified for and is granted property tax deduction for a period of nine (9) years as shown by the schedule outlined below as well as the attachment pursuant to Indiana Code 6-1.1-12.1-17.

Year 1 - 100%  
Year 2 - 100%  
Year 3 - 100%  
Year 4 - 100%  
Year 5 - 100%  
Year 6- 90%  
Year 7- 80%  
Year 8 - 70%  
Year 9 - 60%

SECTION VII. The Common Council directs the City Clerk to cause notice of the adoption of this Declaratory Resolution for Real Property Tax Abatement to be published pursuant to Indiana Code § 5-3-1 and Indiana Code § 6-1.1-12.1-2.5, said publication providing notice of the public hearing before the Common Council on the proposed confirming of said declaration.

SECTION VIII. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approval by the Mayor.



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Sharon L. McBride, President  
South Bend Common Council



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# RESOLUTION

No. 4941-22

Passed by the Common Council of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ February 14, \_\_\_\_\_ 20 22.

Attest: *Dawn M. Jones* City Clerk  
Dawn M. Jones

Attest: *Sharon L. McBride* President of Common Council

Presented by me to the Mayor of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ February 14, \_\_\_\_\_ 20 22

*Dawn M. Jones* City Clerk  
Dawn M. Jones

Approved and signed by me \_\_\_\_\_ February 21 \_\_\_\_\_ 20 22

*J. M. M.* Mayor

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**BILL NO. 22-05**

**RESOLUTION NO. 4941-22**

**A RESOLUTION CONFIRMING THE ADOPTION OF A DECLARATORY  
RESOLUTION DESIGNATING CERTAIN AREAS WITHIN THE CITY OF SOUTH  
BEND, INDIANA, COMMONLY KNOWN AS 3820 W CALVERT STREET, SOUTH  
BEND IN 46613 AS AN ECONOMIC REVITALIZATION AREA FOR  
PURPOSES OF A NINE (9) YEAR REAL  
PROPERTY TAX ABATEMENT FOR  
GREENLEAF HOLDCO**

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WHEREAS, the Common Council of the City of South Bend, Indiana, has adopted a Declaratory Resolution designating certain areas within the City as Economic Revitalization Areas for the purpose of tax abatement consideration; and

WHEREAS, a Declaratory Resolution designated the area commonly known as 3820 W Calvert Street, South Bend IN 46613, and which is more particularly described as follows:

*Parcel ID: 018-8112-4237*  
*Parcel Number: 71-08-16-400-004.000-026*  
*Leal Description: SW SE S OF CALVERT ST 40 AC 16 37 2E*

*Parcel ID: 018-1007-0223*  
*Parcel Number: 71-08-16-400-008.000-026*  
*Legal Description: SE SW1/4 N1271', W589', SW1349', E1175' Sec 16-37-2e 20/21 Split 32329 6/28/2019 to 022301 19/20 ANNEX #10625-18 10/26/18 from 017-1007-0223*

and which has Key Numbers 018-8112-4237 and 018-1007-0223 be designated as an Economic Revitalization Area; and

WHEREAS, notice of the adoption of a Declaratory Resolution and the public hearing before the Council has been published pursuant to Indiana Code 6-1.1-12.1-2.5; and

WHEREAS, the Council held a public hearing for the purposes of hearing all remonstrances and objections from interested persons; and

WHEREAS, the Council has determined that the qualifications for an economic revitalization area have been met.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

**SECTION I.** The Common Council hereby confirms its Declaratory Resolution designating the area described herein as an Economic Revitalization Area for the purposes of tax abatement. Such designation is for Real property tax abatement only and is limited to three (3) calendar years from the date of adoption of the Declaratory Resolution by the Common Council.

**SECTION II.** The Common Council hereby determines that the property owner is qualified for and is granted Real property tax deduction for up to a period of nine (9) years as shown by the schedule outlined below as well as the attachment pursuant to Indiana Code 6-1.1-12.1-17 and further determines that the petition, the Memorandum of Agreement between the Petitioner and the City of South Bend, and the Statement of Benefits comply with Chapter 2, Article 6, of the Municipal Code of the City of South Bend and Indiana Code 6-1.1-12 et seq.

Year 1 - 100%  
Year 2 - 100%

Year 3 - 100%

Year 4 - 100%

Year 5 - 100%

Year 6- 90%

Year 7- 80%

Year 8 - 70%

Year 9 - 60%

SECTION III. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approved by the Mayor.



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Sharon L. McBride, President  
South Bend Common Council

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# RESOLUTION

No. 4944-22

Passed by the Common Council of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ January 24, 20 22 .

Attest: *Dawn M. Jones* \_\_\_\_\_ City Clerk  
Dawn M. Jones

Attest: *Sharon L. McBride* \_\_\_\_\_ President of Common Council

Presented by me to the Mayor of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ January 25, 20 22 .

*Dawn M. Jones* \_\_\_\_\_ City Clerk  
Dawn M. Jones

Approved and signed by me January 26, 20 22 .

*f Mh* \_\_\_\_\_ Mayor

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**BILL NO. 22-08**

**RESOLUTION NO. 4944-22**

**A RESOLUTION OF THE COMMON COUNCIL OF THE  
CITY OF SOUTH BEND DESIGNATING CERTAIN AREAS WITHIN  
THE CITY OF SOUTH BEND, INDIANA, COMMONLY KNOWN AS 3820 W  
CALVERT, SOUTH BEND IN 46613 AN ECONOMIC REVITALIZATION AREA FOR  
PURPOSES OF A (5) FIVE-YEAR PERSONAL PROPERTY TAX ABATEMENT FOR  
GREENLEAF HOLDCO**

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WHEREAS, a petition for personal property tax abatement consideration has been filed with the City Clerk for consideration by the Common Council of the City of South Bend, Indiana, requesting that the area commonly known as 3820 W Calvert Street, South Bend IN 46613, and which is more particularly described as follows:

**Business Personal Property**

and which has Key Numbers to be assigned, be designated as an Economic Revitalization Area under the provisions of Indiana Code 6-1.1-12.1 et seq., and South Bend Municipal Code Sections 2-76 et seq., and;

WHEREAS, the Department of Community Investment has concluded an investigation and prepared a report with information sufficient for the Common Council to determine that the area qualifies as an Economic Revitalization Area under Indiana Code 6-1.1-12.1, et seq., and South Bend Municipal Code Sections 2-76, et seq., and has further prepared maps and plats showing the boundaries and such other information regarding the area in question as required by law; and

WHEREAS, the Community Investment Committee of the Common Council has reviewed said report and recommended to the Common Council that the area qualifies as an Economic Revitalization Area.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

SECTION I. The Common Council hereby determines and finds pursuant to Indiana Code 6-1.1-12.1-4.5 et seq., that:

- a. The estimate of the cost of the new logistical distribution equipment including but not limited to conveyors, scanning and moving equipment, packaging equipment, sorting and picking equipment is reasonable for equipment of that type;
- b. That the estimate of the number of individuals that will be employed or whose employment will be retained by the Petitioner can reasonably be expected to result from the proposed installation of new logistical distribution equipment;
- c. That the estimate of the annual salaries of those individuals that will be employed or whose employment will be retained by the Petitioner can be reasonably expected to result from the proposed installation of new logistical distribution equipment;
- d. Any other benefits about which information was requested are benefits that can be reasonably expected to result from the proposed new logistical distribution equipment; and
- e. The totality of benefits is sufficient to justify the deduction requested.

SECTION II. The Common Council hereby determines and finds that the proposed new logistical distribution equipment can be reasonably expected to yield the benefits identified in the Statement of Benefits as set forth in Sections 1 through 3 of the Petition for Personal Property Tax Abatement Consideration and that Statement of Benefits form completed by the petitioner, said form being prescribed by the State Board of Accounts, are sufficient to justify the deduction granted under Indiana Code 6-1.1-12.1-4.5.

SECTION III. The Common Council hereby accepts the report and recommendation of the Department of Community Investment, and the Community Investment Committee's favorable recommendation, that the area herein described be designated as an Economic Revitalization Area

for purposes of personal property tax abatement and hereby makes such a designation.

SECTION IV. The Common Council determines that such designation is for personal property tax abatement only and shall be limited to three (3) calendar years from the date of the adoption of this Resolution by the Common Council.

SECTION V. The Common Council hereby determines that the property owner is qualified for and is granted property tax deduction for a period of (5) five years as shown below pursuant to Indiana Code 6-1.1-12.1-17.

Year 1-100%  
Year 2- 100%  
Year 3- 100%  
Year 4- 100%  
Year 5- 100%

SECTION VI. The Common Council directs the City Clerk to cause notice of the adoption of this Declaratory Resolution for Personal Property Tax Abatement to be published pursuant to Indiana Code 5-3-1, said publication providing notice of the public hearing before the Common Council on the proposed confirming of said declaration.

SECTION VII. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approval by the Mayor.



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Sharon L. McBride, President  
South Bend Common Council

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# RESOLUTION

No. 4945-22

Passed by the Common Council of the City of South Bend, Indiana \_\_\_\_\_

February 14, 20 22

Attest: *Dawn M. Jones* City Clerk  
Dawn M. Jones

Attest: *Sharon L. McBride* President of Common Council

Presented by me to the Mayor of the City of South Bend, Indiana \_\_\_\_\_

February 14, 20 22

*Dawn M. Jones* City Clerk  
Dawn M. Jones

Approved and signed by me February 21, 20 22

*F. M. H.* Mayor

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**BILL NO. 22-09**

**RESOLUTION NO. 4945-22**

**A RESOLUTION CONFIRMING THE ADOPTION OF A DECLARATORY RESOLUTION DESIGNATING CERTAIN AREAS WITHIN THE CITY OF SOUTH BEND, INDIANA, COMMONLY KNOWN AS 3820 W CALVERT STREET, SOUTH BEND IN AS AN ECONOMIC REVITALIZATION AREA FOR PURPOSES OF A FIVE (5) YEAR PERSONAL PROPERTY TAX ABATEMENT FOR GREENLEAF HOLDCO**

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WHEREAS, the Common Council of the City of South Bend, Indiana, has adopted a Declaratory Resolution designating certain areas within the City as Economic Revitalization Areas for the purpose of tax abatement consideration; and

WHEREAS, a Declaratory Resolution designated the area commonly known as 3820 W Calvert Street, South Bend IN 46613 and which is more particularly described as follows:

**Business Personal Property**

and which has Key Numbers to be assigned, be designated as an Economic Revitalization Area; and

WHEREAS, notice of the adoption of a Declaratory Resolution and the public hearing before the Council has been published pursuant to Indiana Code 6-1.1-12.1-2.5; and

WHEREAS, the Council held a public hearing for the purposes of hearing all remonstrances and objections from interested persons; and

WHEREAS, the Council has determined that the qualifications for an economic revitalization area have been met.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

SECTION I. The Common Council hereby confirms its Declaratory Resolution designating the area described herein as an Economic Revitalization Area for the purposes of tax abatement. Such designation is for personal property tax abatement only and is limited to three (3) calendar years from the date of adoption of the Declaratory Resolution by the Common Council.

SECTION II. The Common Council hereby determines that the property owner is qualified for and is granted personal property tax deduction for a period of five (5) years as shown below pursuant to Indiana Code 6-1.1-12.1-17 and further determines that the petition, the Memorandum of Agreement between the Petitioner and the City of South Bend, and the Statement of Benefits comply with Chapter 2, Article 6, of the Municipal Code of the City of South Bend and Indiana Code 6-1.1-12 et seq.

Year 1-100%  
Year 2- 100%  
Year 3- 100%  
Year 4- 100%  
Year 5- 100%

SECTION III. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approved by the Mayor.



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*Sharon L. McBride*

Sharon L. McBride, President  
South Bend Common Council



# CITY OF SOUTH BEND

## COMMUNITY INVESTMENT

Santiago Garces, Executive Director

January 19, 2022

Council Member Rachel Tomas Morgan, Chairperson  
Community Investment Committee  
South Bend Common Council  
4th Floor, County City Building  
South Bend, IN 46601

RE: Real & Personal Property Tax Abatement Petition for: **Greenleaf HoldCo**

Dear Council Member Tomas Morgan:

Please find the attached information pertaining to a real and personal property tax abatement petition submitted by Greenleaf HoldCo to build a new production facility at 3820 W Calvert Street, South Bend, IN 46613 and purchase new logistical distribution equipment. This petition package includes:

- Department of Community Investment's summary report
- Petition
- Statement of Benefits forms (Real and Personal properties)
- Supporting information

The report contains the Department's findings relative to the above petition. The petitioner proposes to invest approximately \$12,000,000 in new construction and purchase new logistical distribution equipment with estimated cost of \$68,000,000. A total project cost is approximately \$80,000,000. A representative from Greenleaf HoldCo will be available to meet with the Committee on Monday, January 24, 2022.

Should you or any of the other Council members have any questions concerning the report, or need additional information, please feel free to call me at 574-235-5838.

Sincerely,

Angelina Billo

Director of Business Development

## **TAX ABATEMENT REPORT**

TO: South Bend Common Council

FROM: Angelina Billo, Director of Business Development

SUBJECT: REAL & PERSONAL PROPERTY TAX ABATEMENT PETITION FOR:  
**Greenleaf HoldCo**

DATE: January 19, 2022

On Tuesday, January 4, 2022, a petition from Greenleaf HoldCo was received and subsequently filed with the City Clerk for real and personal property tax abatements consideration for property located at 3820 W Calvert Street, South Bend, IN 46613. Pursuant to Chapter 2, Article 6, Section 2-84.2 of the Municipal Code of the City of South Bend, this petition was referred to the Department of Community Investment for purposes of investigation and preparation of a report determining whether the area qualifies as an Economic Revitalization Area pursuant to I.C.6-1.1-12.1 and whether all zoning requirements have been met.

The Department of Community Investment has reviewed the petition (a copy of which is attached), investigated the area, and makes the following report.

### **PROJECT SUMMARY**

- Pure Green Farms (“Pure Green”) was founded by Ceres Partners, South Bend and has since garnered investments from Taylor Farms Inc. and Paul J. Mastronardi (a principal owner of Red Sun Farms).
- Greenleaf Holdco, LLC owns 64.12 acres, but has the ability to expand into the entire nearly 300-acre site via its relationship and mutual ownership with Ceres Partners. Pure Green currently sells to Martins, Kroger, Spartan Nash, Tony’s Fresh Markets, Walt’s Markets, Stanz’s Food Service, Performance Food Service and to LaRosa’s to name a few.
- The existing facility in South Bend consist of 3.5 acres of greenhouse, a main building used for planting, harvesting and cold storage, and another building that houses the boilers and irrigation.
- The current facility has the capability to produce 2 million pounds of lettuce per year and is well on its way to having its production being fully subscribed. Unique to Pure Green is the fact that their planting, grow and harvesting operation is 100% automated and fully staffed with local personnel.
- Greenleaf HoldCo proposes to invest approximately \$12m in new production facilities and \$68m in new logistical distribution equipment including but not limited to conveyors, scanning and moving equipment, packaging equipment, sorting and picking equipment.
- The additional phases of greenhouse builds are planned to be approximately 4.2 acres each, plus additional ancillary buildings. The total lettuce production for all four phases will be approximately 8 million lbs. annually.

### EMPLOYMENT IMPACT

Per this petition, it is estimated that the company will:

- Retain twenty-five (25) permanent full-time jobs representing a total annual payroll of \$1,650,000 and create, at least, seventy-five (75) new full-time jobs with an estimated total annual payroll of \$2,750,000.

### ABATEMENT QUALIFICATION

1. A review of the tax abatements previously granted, finds that the petitioner has not been granted any tax abatements.
2. The Area Plan Commission has reviewed the petition and finds the property to be properly zoned for the proposed project.
3. A review of the South Bend Redevelopment designation areas finds that the property is located in the River West Development Area.
4. A review of the Tax Abatement Ordinance No. 9394-03 finds that the petitioner meets the qualifications for **the nine (9) year real property** and **five (5) year personal property tax abatements** under section 2-82.1, Industrial development in Urban Enterprise Zone and Redevelopment Blighted Areas, and section 2-84.2, Tangible Personal Property Tax Abatement.

# City of South Bend Petition for Incentives



*Petition must include a \$250 filing fee payable to the City Clerk's Office or online via the City's website at <http://southbend.in.gov/government/content/tax-abatement> before processing can be complete*

General Information		Project Name	Project Number
Legal name as registered with Secretary of State		Greenleaf Holdco	
Business structure		Corporation	
Company website		<a href="http://www.enjoypuregreen.com/">http://www.enjoypuregreen.com/</a>	
Proposed Project Information			
Proposed project address		3820 W. Calvert St.	Parent company name N/A
City, State, Zip	South Bend, IN 46613	Legal owner	Greenleaf Holdco
Site acreage or acreage required	65	Is the real estate owned or leased	Owned
Square feet of facility		If leased by whom	
Primary Contact Information			
Primary company contact name		Joe McGuire	Title CEO
Address of company contact		3820 W. Calvert St.	Phone 863-370-3154
City, State, Zip	South Bend, IN 46613	Email	jmguire@gopgf.com
Senior Official Information			
Company senior official name		Joe McGuire	Title
Address of company contact (If different from above)			Phone
City, State, Zip		Email	
Consultant Information/Agent			
Hired business consultant/agent name		Agra Greenhouse Group LLC/ Greg Elam	Consultant release (Y/N) Y
Address		2012 Hebron Trace Drive	Local economic development partners approval (Y/N) Y
City, State, Zip	Nolensville, TN 37135	Email	greg@agragreenhousegroup.com
Project Overview			
Brief description of your company, project, and why the property is necessary for economic growth	<p>Our purpose is to grow fresh produce responsibly through innovative farming. Pure Green Farms currently operates a four acre, state of the art hydroponic greenhouse farming facility that produces four kinds of fresh lettuce for retail and wholesale consumption, 365 days a year. The current facility rests on 65 acres of owned farmland in Southwest South Bend, IN. The existing greenhouse has the target capacity to produce about two million pounds of lettuce a year and seeks to expand operations, exploring options for building additional greenhouses to grow and sell additional lettuce and/or produce.</p>		
Certified Technology Park appropriate	No		
Is the project in a Tax Incremental Financing (TIF) area? If so, which?	Yes		
Certify that the Building Permit has not been issued (Y/N)	Yes	Number of residential units created by project	
If this is a petition for personal property tax abatement, has the equipment been installed	No		

Filed in Clerk's Office

JAN 04 2022

DAWN M. JONES  
CITY CLERK, SOUTH BEND, IN

Investment Details			
Public infrastructure needs (Off-site of project in dollars)	Has any 504 funding been received?	What is the value of any equipment being purchased in Indiana for the project?	What is the value of any equipment being purchased from out of state for the project?
500,000			

New Project Investments								
Calendar Year	2021	2022	2023	2024	2025	2026	2027	2028
Land Acquisition								
Building Lease Payments								
Building Purchase Costs								
New Building Construction		\$ 4,000,000.00	\$ 4,000,000.00	\$ 4,000,000.00				
Existing Building Improvements								
New Machinery & Equipment		\$ 27,200,000.00	\$ 24,000,000.00	\$ 17,000,000.00				
Special Tooling/Retrofitting		\$ 100,000.00						
New Furniture/Fixtures		\$ 30,000.00						
New Computer/IT Hardware		\$ 20,000.00						
New Software		\$ 20,000.00						
On-site Rail Infrastructure								
On-site Fiber Infrastructure								
<b>TOTAL</b>	<b>\$ 0.00</b>	<b>\$ 31,370,000.00</b>	<b>\$ 28,000,000.00</b>	<b>\$ 21,000,000.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>

Full-Time Permanent Indiana-Resident Positions by Calendar Year						
Calendar Year	Jobs retained	Total hourly wage w/o fringe or bonuses	Cumulative # of net NEW full time permanent jobs created at project	Hourly average wage, w/o benefits or bonuses, of cumulative net new jobs	Total training expenditure - not cumulative	Total # to be trained - not cumulative
2021						
2022			45	24.34	32000	35
2023			75	24.34	45000	50
2024			105	24.34	45000	50
2025						
2026						
2027						
2028						
2029						
2030						
2031						
2032						

Provide hourly wage information for new employees in the following positions.		
	Full time	Part time
Laborers	15	15
Technical	20	20
Managerial	17	17
Administrative	20	20

Who will be the individual responsible for coordinating with WorkOne on recruiting?	Jay Paciorek
Does your company have an EEO hiring policy?	Y
Are you an EEO employer?	Y


Please list the number of full time and part time minority and/or female employees for each of the last three years:						Please describe your commitment to diversity and inclusion by detailing your outreach and recruitment efforts for the last three years as well as current policies.	
Year	2020		2019		2018		
	Full Time	Part Time	Full Time	Part Time	Full Time		Part Time
Black							<p>General Hotel LLC does not discriminate in employment opportunities or practices on the basis of race, color, religion, disability, national origin, genetic information, sex (including pregnancy), age, sexual orientation, gender, marital status, protected veterans status, citizenship status or any other characteristics prohibited by applicable law.</p> <p>General Hotel LLC strives to create and maintain a work environment in which employees are treated with dignity, decency and respect. Through its policies and practices, the environment of the company strives to create mutual trust and the absence of intimidation, oppression and exploitation.</p> <p>Please note that Company only had 6 employees at the end of 2020.</p>
Hispanic							
Asian							
Indian							
Female	1						
Other							

**Complete below for Real or Personal Property Tax Abatement only.  
Please sign for all requested incentives.**

**Public Benefit Item:**

Information is required on both the construction companies and the companies which will provide materials purchased for this project. Please complete the table below with the appropriate information. If you qualify for the points, please enter the full amount of available points.		Qualify (Yes or No)	Earned Points	Available Points	
1	<b>Construction Related (Contractors):</b>				
	A.	Employ Local Companies (75%)	Y	20	20
	B.	Purchase Materials from Local Companies (75%)	Y	20	20
	C.	Require Employees vs. Independent Contractors	Y	20	19
	D.	Require Prevailing Wage (Davis Bacon)	N		22
	E.	Require Health Benefits	N		22
	F.	Require Pension Benefits	N		18
	G.	Maintain Affirmative Action Plan	Y	20	20
		<b>Sub-total Construction Related:</b>		<b>80</b>	<b>141</b>
2	<b>Wage &amp; Benefit Related (Owner):</b>				
	A.	Pay Target Wage Levels	Y	33	33
	B.	Provide Health Benefits	Y	34	34
	C.	Provide Pension Benefits (401K w/match)	Y	29	29
	D.	Provide Training	Y	28	28
	E.	Provide Child Care	N		15
	F.	Provide Transportation Assistance	N		14
	G.	Provide Employer Assisted Housing program	N		9
	<b>Sub-total Wage &amp; Benefit Related:</b>		<b>124</b>	<b>162</b>	
3	<b>Workforce Related:</b>				
	A.	Create New Jobs	Y	42	42
	B.	Retain Existing Jobs	Y	41	41
	C.	Maintain Affirmative Action Plan	Y	35	35
	D.	Provide Targeted Hiring Preference			34
	<b>Sub-total Workforce Related:</b>		<b>118</b>	<b>152</b>	
4	<b>Support a Municipal Facility:</b>				
	A.	Support a SB Municipal Facility (donations to the zoo, conservatory, museum, etc.)	Y	84	84
	Name of Facility	South Bend Venues, Parks & Arts			
	<b>Sub-total Municipal Facility:</b>		<b>84</b>	<b>84</b>	
<b>Sub-total from Above:</b>			<b>406</b>	<b>539</b>	

The undersigned owner(s) of real property located within the City of South Bend, hereby petition the Common Council of the City of South Bend for a real and/or personal property tax abatement consideration and pursuant to I.C., 6-1.1-12.1-1, et seq., and South Bend Municipal Code Sec. 2-76 et seq., for this petition state the above.

**Submitted By:**  **Date:** December 24, 2021

For Staff Use Only Below This Line				
What is the current assessed value?	Real Property:	\$65,600	Personal Property:	
What is the projected assessed value?	Real Property:		Personal Property:	
What is the tax key number for this project?	018-8112-4237 and 018-1007-0223			
What is the six digit NAICS code?	111419			
Please attach a Google map and street view of the location.				
Please list the amount of real and personal property taxes paid for the last five years when applicable.		Real Property Taxes:	Personal Property Taxes:	
Pay 2021	Year One	\$1,651		
Pay 2020	Year Two	\$2,950		
	Year Three			
	Year Four			
	Year Five			
Please fill out the following Public Benefit Summary Information and add to total from above.				
		(Y or N)	Points	Points
Public Benefit Item:				
<u>Project Related:</u>				
5	A.	Redevelop a Site that has Special Needs		49
	B.	Develop Based on Local University Research		35
	C.	Achieve a Physical Element of a Plan		36
	Sub-total Project Related:			120
6	<u>Super Size Projects (point values are cumulative):</u>			
	A.	100% to 199%	Y	25
	B.	200% to 299%	Y	68
	C.	300% to 399%	Y	65
	D.	400% and Over	Y	52
Sub-total Super Size Projects:			210	210
7	<u>Pay for Municipal Infrastructure:</u>			
	A.	Pay for Oversizing or Upgrading		14
	B.	Pay for 26-50% of Extension Cost		26
	C.	Pay for 51-75% of Extension Cost		39
	D.	Pay for 76-100% of Extension Cost		52
Sub-total Infrastructure Related:				131
Total from Applicant Section:			406	539
Total from Staff Section:			210	461
Total Public Benefit Points:			616	1000



Filed in Clerk's Office  
 JAN 04 2022  
 DAWN M. JONES  
 CITY CLERK, SOUTH BEND, IN



**STATEMENT OF BENEFITS  
 REAL ESTATE IMPROVEMENTS**

State Form 51787 (R6 / 10-14)  
 Prescribed by the Department of Local Government Finance

20__ PAY 20__
FORM SB-1 / Real Property
<b>PRIVACY NOTICE</b>
Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

This statement is being completed for real property that qualifies under the following Indiana Code (check one box):  
 Redevelopment or rehabilitation of real estate improvements (IC 6-1.1-12.1-4)  
 Residentially distressed area (IC 6-1.1-12.1-4.1)

**INSTRUCTIONS:**

- 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.
- The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the initiation of the redevelopment or rehabilitation for which the person desires to claim a deduction.
- To obtain a deduction, a Form 322/RE must be filed with the County Auditor before May 10 in the year in which the addition to assessed valuation is made or not later than thirty (30) days after the assessment notice is mailed to the property owner if it was mailed after April 10. A property owner who failed to file a deduction application within the prescribed deadline may file an application between March 1 and May 10 of a subsequent year.
- A property owner who files for the deduction must provide the County Auditor and designating body with a Form CF-1/Real Property. The Form CF-1/Real Property should be attached to the Form 322/RE when the deduction is first claimed and then updated annually for each year the deduction is applicable. IC 6-1.1-12.1-5.1(b)
- For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/Real Property that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. IC 6-1.1-12.1-17

SECTION 1 TAXPAYER INFORMATION						
Name of taxpayer Greenleaf Holdeo, LLC dba Pure Green Farms						
Address of taxpayer (number and street, city, state, and ZIP code) 3820 W. Calvert						
Name of contact person Joe McGuire, CEO			Telephone number (863) 370-3154		E-mail address jmcguire@gopgf.com	
SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT						
Name of designating body City of South Bend/St. Joseph's County					Resolution number	
Location of property 3820 W. Calvert South Bend, IN 46613			County St. Joseph		DLGF taxing district number 026 South Bend (Portage)	
Description of real property improvements, redevelopment, or rehabilitation (use additional sheets if necessary) Continued development of 64 acre parcel of unused farmland into state-of-the-art hydroponic greenhouse complex. Expand existing 4 acre facility by adding additional vegetable growing greenhouses. Estimate between 15 to 20 more acres of the unused property can be transformed into an environmentally sustainable and esthetically pleasing agricultural showpiece and manufacturing hub that will produce and distribute fresh produce for the entire midwest region.					Estimated start date (month, day, year) 1/1/22	
					Estimated completion date (month, day, year) 12/31/24	
SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT						
Current number 25	Salaries 1.65M/Year	Number retained 25	Salaries 1.65M/Year	Number additional 75	Salaries 2.75M/Year	
SECTION 4 ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT						
<b>REAL ESTATE IMPROVEMENTS</b>						
			<b>COST</b>		<b>ASSESSED VALUE</b>	
Current values			2.27M		In Progress	
Plus estimated values of proposed project			12M		-- --	
Less values of any property being replaced			-----		-- --	
Net estimated values upon completion of project			14.27M		-- --	
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER						
Estimated solid waste converted (pounds) Variable but will increase annually			Estimated hazardous waste converted (pounds) N/A			
Other benefits Benefits will include job development, and significant technological advancements and opportunities for the region. Expansion will maximize utilization of unused land and will establish region as a nationally recognized hub of agricultural food supply and commerce generation. Developed facilities will augment the current development of the Olive St. Road Corridor project and neighboring casino property, through the availability of touring and expanding educational opportunities for area high schools, universities and career exploration programs. Current public interest in our facility has been extremely robust and we expect it will vastly increase as the facility expands, promoting tourism. Complex will produce a variety of local, fresh vegetables while maximizing environmentally sustainable, conservation friendly and ecologically enhancing practices.						
SECTION 6 TAXPAYER CERTIFICATION						
I hereby certify that the representations in this statement are true.						
Signature of authorized representative <i>J. Jay Raciorek</i>					Date signed (month, day, year) 11/10/21	
Printed name of authorized representative J. Jay Raciorek					Title Director of Finance	

**FOR USE OF THE DESIGNATING BODY**

We find that the applicant meets the general standards in the resolution adopted or to be adopted by this body. Said resolution, passed or to be passed under IC 6-1.1-12.1, provides for the following limitations:

- 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  Yes  No  
 2. Residentially distressed areas  Yes  No
- C. The amount of the deduction applicable is limited to \$ \_\_\_\_\_.
- D. Other limitations or conditions (*specify*) \_\_\_\_\_
- E. Number of years allowed:  Year 1  Year 2  Year 3  Year 4  Year 5 (\* see below)  
 Year 6  Year 7  Year 8  Year 9  Year 10
- F. For a statement of benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?  
 Yes  No  
 If yes, attach a copy of the abatement schedule to this form.  
 If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

We have also 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 of designating body</i> )	Telephone number (     )	Date signed ( <i>month, day, year</i> )
Printed name of authorized member of designating body	Name of designating body	
Attested by ( <i>signature and title of attester</i> )	Printed name of attester	

\* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

- A. For residentially distressed areas where the Form SB-1/Real Property was approved prior to July 1, 2013, the deductions established in IC 6-1.1-12.1-4.1 remain in effect. The deduction period may not exceed five (5) years. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. The deduction period may not exceed ten (10) years. (See IC 6-1.1-12.1-17 below.)
- B. For the redevelopment or rehabilitation of real property where the Form SB-1/Real Property was approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. (See IC 6-1.1-12.1-17 below.)

**IC 6-1.1-12.1-17**

**Abatement schedules**

Sec. 17. (a) A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
  - (2) The number of new full-time equivalent jobs created.
  - (3) The average wage of the new employees compared to the state minimum wage.
  - (4) The infrastructure requirements for the taxpayer's investment.
- (b) This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. An abatement schedule may not exceed ten (10) years.
- (c) An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.



**STATEMENT OF BENEFITS  
PERSONAL PROPERTY**

State Form 51764 (R4 / 11-15)  
Prescribed by the Department of Local Government Finance

Filed in Clerk's Office  
JAN 04 2022  
DAWN M. JONES  
CITY CLERK, SOUTH BEND, IN

FORM SB-1 / PP

**PRIVACY NOTICE**

Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

**INSTRUCTIONS**

- 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.
- The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the installation of qualifying abatable equipment for which the person desires to claim a deduction.
- To obtain a deduction, a person must file a certified deduction schedule with the person's personal property return on a certified deduction schedule (Form 103-ERA) with the township assessor of the township where the property is situated or with the county assessor if there is no township assessor for the township. The 103-ERA must be filed between January 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 is installed and fully functional, unless a filing extension has been obtained. A person who obtains a filing extension must file the form between January 1 and the extended due date of that year.
- Property owners whose Statement of Benefits was approved, must submit Form CF-1/PP annually to show compliance with the Statement of Benefits. (IC 6-1.1-12.1-5.6)
- For a Form SB-1/PP that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/PP that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. (IC 6-1.1-12.1-17)

SECTION 1 TAXPAYER INFORMATION									
Name of taxpayer Greenleaf Hold Co. dba Pure Green Farms			Name of contact person Joe McGuire, CEO						
Address of taxpayer (number and street, city, state, and ZIP code) 3820 W. Calvert				Telephone number ( 863 ) 370-3154					
SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT									
Name of designating body City of South Bend / St. Joseph County				Resolution number (s)					
Location of property 3820 W. Calvert South Bend, IN 46613			County St. Joseph	DLGF taxing district number 026 South Bend (Portage)					
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.)  Please refer to supplemental sheet				ESTIMATED					
				START DATE		COMPLETION DATE			
				Manufacturing Equipment		1/1/22	12/31/24		
				R & D Equipment		N/A		N/A	
				Logist Dist Equipment		N/A		N/A	
IT Equipment		1/1/22	12/31/24						
SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT									
Current number 25	Salaries 1.65M/Year	Number retained 25	Salaries 1.65M/Year	Number additional 75	Salaries 2.75M/Year				
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	21M	In Progress					80K	In Progress
	Plus estimated values of proposed project	70M	In Progress					30K	In Progress
	Less values of any property being replaced	-----	-----					-----	-----
Net estimated values upon completion of project	91M	In Progress					110K	In Progress	
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER									
Estimated solid waste converted (pounds) <u>Variable and Increasing</u>			Estimated hazardous waste converted (pounds) <u>N/A</u>						
Other benefits: Please refer to supplemental sheet									
SECTION 6 TAXPAYER CERTIFICATION									
I hereby certify that the representations in this statement are true.									
Signature of authorized representative 				Date signed (month, day, year) 1/10/21					
Printed name of authorized representative J. Jay Paciorek			Title Director of Finance						

**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 \_\_\_\_\_. *NOTE: This question addresses whether the resolution contains an expiration date for the designated area.*
- 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 | <input type="checkbox"/> Enhanced Abatement per IC 6-1.1-12.1-18<br>Check box if an enhanced abatement was approved for one or more of these types. |
| 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 \$ \_\_\_\_\_. *(One or both lines may be filled out to establish a limit, if desired.)*
- D. The amount of deduction applicable to new research and development equipment is limited to \$ \_\_\_\_\_ cost with an assessed value of \$ \_\_\_\_\_. *(One or both lines may be filled out to establish a limit, if desired.)*
- E. The amount of deduction applicable to new logistical distribution equipment is limited to \$ \_\_\_\_\_ cost with an assessed value of \$ \_\_\_\_\_. *(One or both lines may be filled out to establish a limit, if desired.)*
- F. The amount of deduction applicable to new information technology equipment is limited to \$ \_\_\_\_\_ cost with an assessed value of \$ \_\_\_\_\_. *(One or both lines may be filled out to establish a limit, if desired.)*
- 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 is allowed for:
- |                                 |                                 |                                 |                                 |                                  |   |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|----------------------------------|---|
| <input type="checkbox"/> Year 1 | <input type="checkbox"/> Year 2 | <input type="checkbox"/> Year 3 | <input type="checkbox"/> Year 4 | <input type="checkbox"/> Year 5  | <input type="checkbox"/> Enhanced Abatement per IC 6-1.1-12.1-18<br>Number of years approved: _____<br><i>(Enter one to twenty (1-20) years; may not exceed twenty (20) years.)</i> |
| <input type="checkbox"/> Year 6 | <input type="checkbox"/> Year 7 | <input type="checkbox"/> Year 8 | <input type="checkbox"/> Year 9 | <input type="checkbox"/> Year 10 |   |
- I. For a Statement of Benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?  Yes  No  
If yes, attach a copy of the abatement schedule to this form.  
If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

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 by: <i>(signature and title of authorized member of designating body)</i>	Telephone number ( )	Date signed <i>(month, day, year)</i>
Printed name of authorized member of designating body	Name of designating body	
Attested by: <i>(signature and title of attester)</i>	Printed name of attester	

\* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

**IC 6-1.1-12.1-17**

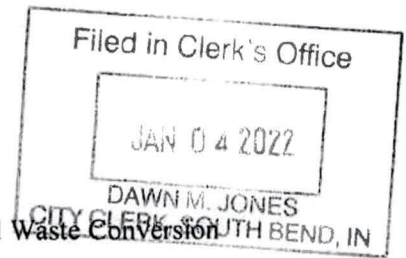
**Abatement schedules**

Sec. 17. (a) A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
- (2) The number of new full-time equivalent jobs created.
- (3) The average wage of the new employees compared to the state minimum wage.
- (4) The infrastructure requirements for the taxpayer's investment.

(b) This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. An abatement schedule may not exceed ten (10) years.

(c) An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.



Pure Green Farms Supplemental Sheet

Form SB-1/PP Section 2: Description of Manufacturing Equipment and Waste Conversion Benefits

Our current location in South Bend is situated strategically and employs advanced technology to promote a safe and sustainable environment in which to grow its leafy greens (additional vegetable/fruit varieties are being researched). With the use of sun and minimal reliance on artificial light, energy efficiency is maximized. The current site rests on a 64-acre purchased parcel that can potentially expand up to 300 acres.

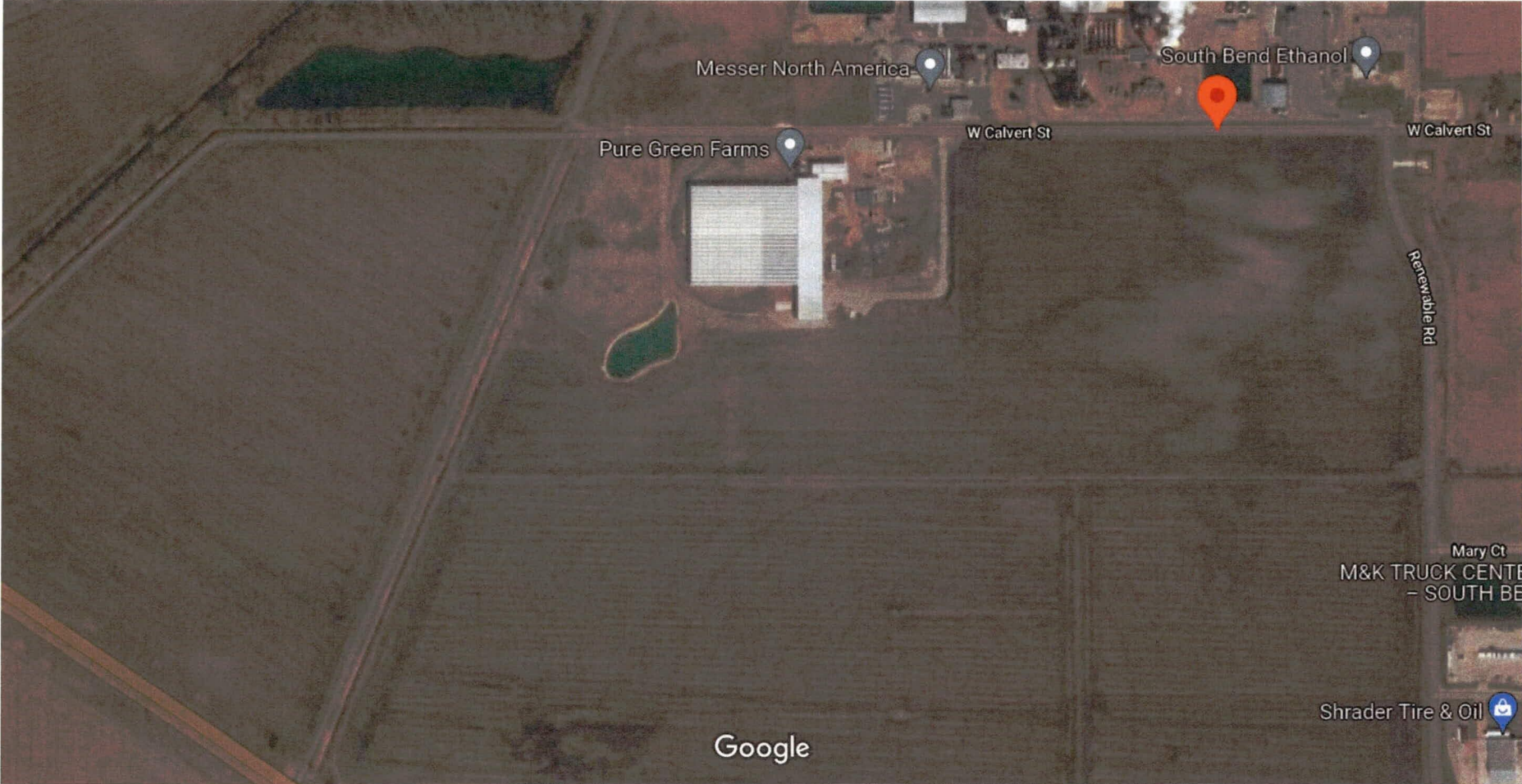
The growing and packing systems are the most advanced in the industry, allowing for very minimal human hands touching the product. Robotics, sensors and video technology are installed throughout the greenhouse and the harvesting area. This streamlines our farm to table process and gives our customers peace of mind that they are getting their greens safely and sooner for a better-quality experience.

The current (and all future additional) greenhouses deploy advanced automated growing systems that control and regulate all processing, growing, harvesting and production evolutions in the produce cycle. The greenhouse uses innovative climate management technologies to monitor and control the heating, the lighting, the air movement, general atmosphere, and concentration of CO<sub>2</sub>.

Multiple screens in the greenhouse growing enclosures help manage light and temperature. The operations are also economically sustainable, utilizing recycling and using an estimated 90% less water compared to field grown lettuce or operating in a fully pest free environment.

As the greens grow, automated gutters move and adjust to allow for increased spacing between plants. This helps the company achieve space efficiency throughout the facility. Labor efficiency is also significantly improved through Pure Green's automatic seeding, harvesting, and packing technology.

Food safety is also top of mind at Pure Green. The indoor farm environment is pesticide-free and uses less water, meaning Pure Green's products are fresh, crisp, and offer the buy-side a long shelf life. Unique, high-quality varieties distributed to a select region maximize natural resources and minimize shrink and overall waste.



9 YEAR

19-Jan-22

**Greenleaf Holdco**

South Bend Portage Township  
Real Property Tax Abatement Schedule\*

Tax Key Number  
Current Assessed Value: Multiple  
Estimated Project Cost: 0  
12,000,000

<u>Assessed Value:</u>		Current <u>AV &amp; Tax</u>	Without <u>Abatement</u>	100% <u>Year 1</u>	100% <u>Year 2</u>	100% <u>Year 3</u>	100% <u>Year 4</u>	100% <u>Year 5</u>	90% <u>Year 6</u>	80% <u>Year 7</u>	70% <u>Year 8</u>	60% <u>Year 9</u>
Current Assessed Value	100%	0	0	0	0	0	0	0	0	0	0	0
Base Assessed Value	80%		9,600,000	9,600,000	9,600,000	9,600,000	9,600,000	9,600,000	9,600,000	9,600,000	9,600,000	9,600,000
Less Abatement Deduction			0	(9,600,000)	(9,600,000)	(9,600,000)	(9,600,000)	(9,600,000)	(8,640,000)	(7,680,000)	(6,720,000)	(5,760,000)
Net Assessed Value		0	9,600,000	0	0	0	0	0	960,000	1,920,000	2,880,000	3,840,000
<u>Property Taxes:</u>												
Assume constant tax rate of		5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%
Gross Tax (tax rate x net assessed value)		0	517,522	0	0	0	0	0	51,752	103,504	155,257	207,009
Less Circuit Breaker Credit		0	(229,522)	0	0	0	0	0	0	0	0	0
Net Tax		0	288,000	0	0	0	0	0	51,752	103,504	155,257	207,009
Circuit Breaker Cap												
Circuit Breaker	3.0000%	0	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000
Debt Service	0.0000%	0	0	0	0	0	0	0	0	0	0	0
Circuit Braker Cap		0	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000

<u>Year</u>	<u>Existing Taxes</u>	<u>New Project Taxes</u>	<u>Combined Existing &amp; New Taxes</u>	<u>Tax Abated</u>	<u>Net Tax Paid</u>
1	0	288,000	288,000	288,000	0
2	0	288,000	288,000	288,000	0
3	0	288,000	288,000	288,000	0
4	0	288,000	288,000	288,000	0
5	0	288,000	288,000	288,000	0
6	0	288,000	288,000	236,248	51,752
7	0	288,000	288,000	184,496	103,504
8	0	288,000	288,000	132,743	155,257
9	0	288,000	288,000	80,991	207,009
Totals	0	2,592,000	2,592,000	2,074,478	517,522

\*This schedule is for estimation purposes only and assumes constant tax rates. The true tax values will ultimately be determined by the actual assessed valuation and the then current tax rates.

## Greenleaf Holdco

### South Bend Portage Township Personal Property Tax Abatement Schedule\*

Tax Key Number TBD  
 Current Assessed Value: 0  
 Estimated Project Cost: 68,000,000

		100%	100%	100%	100%	100%
		Year 1	Year 2	Year 3	Year 4	Year 5
		<u>Assessed Value:</u>				
Current Assessed Value	100%	0	0	0	0	0
Base Assessed Value		27,200,000	40,800,000	37,400,000	30,600,000	25,160,000
Less Abatement Deduction		(27,200,000)	(40,800,000)	(37,400,000)	(30,600,000)	(25,160,000)
Net Assessed Value		0	0	0	0	0
		<u>Property Taxes:</u>				
Assume constant tax rate of		5.3909%	5.3909%	5.3909%	5.3909%	5.3909%
Gross Tax (tax rate x net assessed value)		0	0	0	0	0
Less Circuit Breaker Credit		0	0	0	0	0
Net Tax		0	0	0	0	0
		<u>Circuit Breaker Cap</u>				
Circuit Breaker	3.0000%	0	816,000	1,224,000	1,122,000	918,000
Debt Service	0.0000%	0	0	0	0	0
Circuit Braker Cap		0	816,000	1,224,000	1,122,000	918,000

Year	Existing Taxes	New Project Taxes	Combined Existing & New Taxes	Tax Abated	Net Tax Paid
Year 1	0	816,000	816,000	816,000	0
Year 2	0	1,224,000	1,224,000	1,224,000	0
Year 3	0	1,122,000	1,122,000	1,122,000	0
Year 4	0	918,000	918,000	918,000	0
Year 5	0	754,800	754,800	754,800	0
Totals	0	4,834,800	4,834,800	4,834,800	0

\*This schedule is for estimation purposes only and assumes constant tax rates. The true tax values will ultimately be determined by the actual assessed valuation and the then current tax rates.



# 25-03



## CITY OF SOUTH BEND COMMUNITY INVESTMENT

Filed in Clerk's Office

JAN 08 2025

Bianca Tirado  
City Clerk, South Bend, IN

January 8, 2025

Council Member Troy Warner  
Chairperson, Community Investment Committee  
South Bend Common Council  
4<sup>th</sup> Floor, County-City Building  
South Bend, Indiana 46601

RE: **Reconfirming Resolutions (2)**: Real Property Tax Abatement and Personal Property Tax Abatement for **Greenleaf Holdco LLC**

Dear Council Member Warner,

Please find enclosed two resolutions that would reconfirm a real property tax abatement and personal property tax abatement, respectively, for Greenleaf Holdco LLC, the owner of the parcels for Pure Green Farms, located at 3820 W. Calvert Street in South Bend.

On February 14, 2022, the Common Council of South Bend adopted Confirming Resolution 4941-22, which confirmed Declaratory Resolution 4939-22 to establish a nine-year (9) real property tax abatement for an expansion project by Pure Green Farms. Also on February 14, 2022, the Common Council adopted Confirming Resolution 4945-22, which confirmed Declaratory Resolution 4944-22 to establish a five-year (5) personal property tax abatement for equipment to be purchased and installed for the expansion. The designation periods for each abatement are set to expire on January 24, 2025.

The expansion project has been delayed, and a representative of Pure Green Farms contacted the Department of Community Investment seeking support for an extension of the designation period. According to the company representative, the expansion project is scheduled to begin by mid-2025, and the previously granted tax abatements are necessary for the project to move forward.

The Reconfirming Resolutions serve two primary purposes: (1) reconfirm the Declaratory Resolution adopted in 2022 and (2) extend the designation period to the end of 2026.

A representative from Pure Green Farms will be available to meet with the Committee on Monday, January 13, 2025. If you or any of the other Council members have questions concerning the report or need additional information, please feel free to call me at (574) 235-5838.

Sincerely,

Erik Glavich  
Director, Growth and Opportunity

EXCELLENCE | ACCOUNTABILITY | INNOVATION | INCLUSION | EMPOWERMENT

14005 County-City Building | 227 W. Jefferson Blvd. | South Bend, Indiana 46601 | p 574.235.9371 | www.southbendin.gov

JAN 08 2025

Bianca Tirado  
City Clerk, South Bend, IN

**BILL NO. 25-03**  
**RESOLUTION NO. \_\_\_\_\_**

A RESOLUTION MODIFYING AND RECONFIRMING THE ADOPTION OF  
DECLARATORY RESOLUTION NO. 4944-22 DESIGNATING CERTAIN  
AREAS WITHIN THE CITY OF SOUTH BEND, INDIANA, COMMONLY  
KNOWN AS

**3820 West Calvert Street, South Bend, IN 46613**

AN ECONOMIC REVITALIZATION AREA FOR PURPOSES OF A  
FIVE-YEAR (5) PERSONAL PROPERTY TAX ABATEMENT FOR

**Greenleaf Holdco LLC**

---

WHEREAS, the Common Council of the City of South Bend, Indiana, has adopted a Declaratory Resolution designating certain areas within the City as Economic Revitalization Areas for the purpose of tax abatement consideration; and

WHEREAS, Declaratory Resolution No. 4944-22 designated the area commonly known as 3820 W. Calvert Street, South Bend, Indiana 46613, and which is more particularly described as:

**Business Personal Property**

and which has Key Numbers to be assigned, as an Economic Revitalization Area under the provisions of Indiana Code 6-1.1-12.1 et seq., and South Bend Municipal Code Sections 2-76 et seq.; and

WHEREAS, upon proper notice, a public hearing was held, after which the Common Council adopted Confirming Resolution No. 4945-22 on February 14, 2022, confirming the adoption of Declaratory Resolution No. 4944-22; and

WHEREAS, the Common Council, through the adoption of Confirming Resolution No. 4945-22, provided a personal property tax abatement to Greenleaf Holdco LLC for the purchase and installation of equipment to be used in a new commercial facility for food production at the area designated as an Economic Revitalization Area through the adoption of Declaratory Resolution No. 4944-22; and

WHEREAS, Pure Green Farms is an assumed business name of Greenleaf Holdco LLC as certified by the Office of the Secretary of State of the State of Indiana; and

WHEREAS, Greenleaf Holdco LLC, operating as Pure Green Farms, plants, grows, harvests, packages, and distributes lettuces grown at an existing greenhouse facility at the location commonly known as 3820 W. Calvert Street, South Bend, Indiana 46613; and

WHEREAS, Greenleaf Holdco LLC was granted a three-year (3) designation period in Confirming Resolution No. 4945-22, which will expire on January 24, 2025; and

WHEREAS, construction on the new commercial facility for food production was delayed by project development challenges and other issues outside of the control of Greenleaf Holdco LLC; and

WHEREAS, completion of the project by end of the original designation period was not possible; and

WHEREAS, Greenleaf Holdco LLC has not yet purchased and installed equipment that would have qualified for the personal property tax abatement provided through the adoption of Confirming Resolution No. 4945-22; and

WHEREAS, the project will be completed by the end of 2026; and

WHEREAS, Greenleaf Holdco LLC has requested that the designation period confirmed by Confirming Resolution No. 4945-22 be extended; and

WHEREAS, the Common Council desires to reconfirm the designation of the area designated by Declaratory Resolution No. 4944-22 and confirmed by Confirming Resolution No. 4945-22 as an Economic Revitalization Area for purposes of a five-year (5) personal property tax abatement; and

WHEREAS, the Common Council desires to extend the designation period confirmed by Confirming Resolution No. 4945-22; and

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

SECTION I. The Common Council hereby reconfirms Declaratory Resolution No. 4944-22 and Confirming Resolution No. 4945-22 for purposes of a five-year (5) real property tax abatement.

SECTION II. The designation as an Economic Revitalization Area for purposes of a five-year (5) personal property tax abatement expires on December 31, 2026.

SECTION III. The Common Council hereby determines that Greenleaf Holdco LLC is qualified and is granted property tax deduction for a period of five (5) years as shown in Section V of Declaratory Resolution No. 4944-22 and further determines that the petition, the Statement of Benefits, and the Memorandum of Agreement between Greenleaf Holdco LLC and the City of South Bend associated with Declaratory Resolution No. 4944-22 as adopted on January 24, 2022, and Confirming Resolution No. 4945-22 as adopted on February 14, 2022, comply with Chapter 2, Article 6, of the Municipal Code of the City of South Bend and Indiana Code 6-1.1-12 et seq.

SECTION IV. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approved by the Mayor.

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Canneth Lee, Council President  
South Bend Common Council

Attest:

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Bianca Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana, on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_\_ o'clock \_\_\_\_ .m.

---

Bianca Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_ o'clock \_\_\_\_ .m.

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James Mueller, Mayor  
City of South Bend

**Greenleaf Holdco LLC**

South Bend Portage Township  
 Commerical Development Real Property Tax Abatement Schedule \*

Filed in Clerk's Office

JAN 08 2025

Bianca Tirado  
 City Clerk, South Bend, IN

Type of Property: Greenhouse  
 Estimated Project Cost: \$12,000,000 Addition  
 Property Address: 3820 W. Calvert Street  
 Tax Key Number: 71-08-16-400-004.000-026; 71-08-16-400-008.000-026

	Current	Without Abatement	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9
<i>Assessed Value (AV)</i>											
Land	\$ 230,500	\$ 230,500	\$ 230,500	\$ 230,500	\$ 230,500	\$ 230,500	\$ 230,500	\$ 230,500	\$ 134,400	\$ 134,400	\$ 134,400
Structure (Current AV + 80% Project Cost)	5,179,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500	14,779,500
Gross Assessed Value	5,410,000	15,010,000	15,010,000	15,010,000	15,010,000	15,010,000	15,010,000	15,010,000	14,913,900	14,913,900	14,913,900
<i>Abatement</i>			100%	100%	100%	100%	100%	90%	80%	70%	60%
Abatement Deduction		-	(9,600,000)	(9,600,000)	(9,600,000)	(9,600,000)	(9,600,000)	(8,640,000)	(7,680,000)	(6,720,000)	(5,760,000)
Net Assessed Value	5,410,000	15,010,000	5,410,000	5,410,000	5,410,000	5,410,000	5,410,000	6,370,000	7,233,900	8,193,900	9,153,900
<i>Property Taxes</i>											
Assume constant tax rate of 5.3548%											
Gross Tax (Tax Rate x Net AV)	289,695	803,755	289,695	289,695	289,695	289,695	289,695	341,101	387,361	438,767	490,173
Local Tax Credit (12.3682% of GT-DS)	(33,261)	(92,281)	(33,261)	(33,261)	(33,261)	(33,261)	(33,261)	(39,163)	(44,474)	(50,376)	(56,278)
Circuit Breaker Credit	(74,321)	(204,497)	(2,264)	(2,264)	(2,264)	(2,264)	(2,264)	(2,264)	-	-	-
Taxes Due	\$ 182,113	\$ 506,977	\$ 254,170	\$ 254,170	\$ 254,170	\$ 254,170	\$ 254,170	\$ 299,674	\$ 342,887	\$ 388,391	\$ 433,895
<i>Circuit Breaker Cap</i>	161,339	449,339	449,339	449,339	449,339	449,339	449,339	449,339	447,417	447,417	447,417
Debt Service (0.3840% of Net AV)	20,774	57,638	20,774	20,774	20,774	20,774	20,774	24,461	27,778	31,465	35,151
Max Tax Under the Cap	182,113	506,977	470,113	470,113	470,113	470,113	470,113	473,800	475,195	478,882	482,568

Year	Abatement	Current Taxes Due	New Projected Tax	Combined Current & New Taxes	Taxes Abated	Net Taxes Paid
1	100%	\$ 182,113	\$ 324,864	\$ 506,977	\$ (252,807)	\$ 254,170
2	100%	182,113	324,864	506,977	(252,807)	254,170
3	100%	182,113	324,864	506,977	(252,807)	254,170
4	100%	182,113	324,864	506,977	(252,807)	254,170
5	100%	182,113	324,864	506,977	(252,807)	254,170
6	90%	182,113	324,864	506,977	(207,303)	299,674
7	80%	182,113	324,864	506,977	(164,090)	342,887
8	70%	182,113	324,864	506,977	(118,586)	388,391
9	60%	182,113	324,864	506,977	(73,082)	433,895
<b>Total:</b>		<b>1,639,021</b>	<b>2,923,776</b>	<b>4,562,797</b>	<b>(1,827,100)</b>	<b>2,735,697</b>

\* This schedule is for estimation purposes only and assumes constant tax rates equal to those for 2023 Payable 2024. The true tax values will ultimately be determined by the actual assessed valuation and the then current tax rates.



## Greenleaf Holdco LLC

*South Bend Portage Township  
Personal Property Tax Abatement Schedule \**

Estimated Equipment Cost: \$ 70,030,000  
 Asset Pool: Pool #4 (13 years and longer)  
 Property Address: 3820 W. Calvert Street  
 Tax Key Number: TBD

	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	<u>Year 5</u>
<i>Assessed Value (AV)</i>					
True Tax Value (TTV)	40%	60%	63%	54%	46%
New Base (Equipment Cost x TTV)	28,012,000	42,018,000	44,118,900	37,816,200	32,213,800
<i>Abatement</i>					
Abatement Deduction	100%	100%	100%	100%	100%
	(28,012,000)	(42,018,000)	(44,118,900)	(37,816,200)	(32,213,800)
Net Assessed Value	-	-	-	-	-
<i>Property Taxes</i>					
Assume constant tax rate of 5.3548%					
Gross Tax (Tax Rate x Net AV)	-	-	-	-	-
Debt Service (0.3840% of Net AV)	-	-	-	-	-
Local Tax Credit (12.3682% of GT-DS)	-	-	-	-	-
Circuit Breaker Credit	-	-	-	-	-
<b>Taxes Due</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<i>Circuit Breaker Cap</i>					
	3%	3%	3%	3%	3%
	840,360	1,260,540	1,323,567	1,134,486	966,414

Year	Abatement	New Projected Tax	Taxes Abated	Net Taxes Paid
1	100%	\$ 947,926	\$ (947,926)	\$ -
2	100%	1,421,889	(1,421,889)	-
3	100%	1,492,984	(1,492,984)	-
4	100%	1,279,700	(1,279,700)	-
5	100%	1,090,115	(1,090,115)	-
<b>Years 1-5 Total:</b>		<b>6,232,614</b>	<b>(6,232,614)</b>	<b>-</b>
<i>Years 6-10 Total:</i>		<i>3,531,025</i>	<i>-</i>	<i>3,531,025</i>

\* This schedule is for estimation purposes only and assumes constant tax rates equal to those for 2023 Payable 2024.  
 The true tax values will ultimately be determined by the actual assessed valuation and the then current tax rates.





**STATEMENT OF BENEFITS  
REAL ESTATE IMPROVEMENTS**

State Form 51767 (R7 / 1-21)

Prescribed by the Department of Local Government Finance

2025 PAY 2026

FORM SB-1 / Real Property

**PRIVACY NOTICE**

Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

This statement is being completed for real property that qualifies under the following Indiana Code (*check one box*):

- Redevelopment or rehabilitation of real estate improvements (IC 6-1.1-12.1-4)
- Residentially distressed area (IC 6-1.1-12.1-4.1)

**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.
2. The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the initiation of the redevelopment or rehabilitation for which the person desires to claim a deduction.
3. To obtain a deduction, a Form 322/RE must be filed with the county auditor before May 10 in the year in which the addition to assessed valuation is made or not later than thirty (30) days after the assessment notice is mailed to the property owner if it was mailed after April 10. A property owner who failed to file a deduction application within the prescribed deadline may file an application between January 1 and May 10 of a subsequent year.
4. A property owner who files for the deduction must provide the county auditor and designating body with a Form CF-1/Real Property. The Form CF-1/Real Property should be attached to the Form 322/RE when the deduction is first claimed and then updated annually for each year the deduction is applicable. IC 6-1.1-12.1-5.1(b)
5. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/Real Property that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. IC 6-1.1-12.1-17

SECTION 1						TAXPAYER INFORMATION					
Name of taxpayer <b>Greenleaf Holdco LLC</b>											
Address of taxpayer Number and Street: <b>3820 W. Calvert Street</b> City: <b>South Bend</b> State: <b>IN</b> ZIP: <b>46613</b>											
Name of contact person First Name: <b>Joe</b> Last Name: <b>McGuire</b>				Telephone number <b>(863) 370-3154</b>				E-mail address <b>jmcguire@gopgf.com</b>			
SECTION 2						LOCATION AND DESCRIPTION OF PROPOSED PROJECT					
Name of designating body <b>Common Council of the City of South Bend</b>										Resolution number	
Location of property <b>3820 W. Calvert Street</b>		Number and Street <b>South Bend</b>		City <b>IN</b>		State <b>46613</b>		ZIP <b>St. Joseph</b>		County <b>DLGF taxing district number 026 (South Bend-Portage)</b>	
Description of real property improvements, redevelopment, or rehabilitation ( <i>use additional sheets if necessary</i> ) Continued development of 64-acre parcel of unused farmland into state-of-the-art hydroponic greenhouse complex. Expand existing 4-acre facility by adding additional vegetable growing greenhouses. Estimate between 15 to 20 more acres of the unused property can be transformed into an environmentally sustainable and aesthetically pleasing agricultural showplace and manufacturing hub that will produce and distribute fresh produce for the entire Midwest region.										Estimated start date (month, day, year) <b>4/1/2025</b>	
										Estimated completion date (month, day, year) <b>12/31/2026</b>	
SECTION 3						ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT					
Current Number <b>25</b>		Salaries <b>\$ 1,650,000</b>		Number Retained <b>25</b>		Salaries <b>\$ 1,650,000</b>		Number Additional <b>75</b>		Salaries <b>\$ 2,750,000</b>	
SECTION 4						ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT					
						<b>REAL ESTATE IMPROVEMENTS</b>					
						<b>COST</b>			<b>ASSESSED VALUE</b>		
Current values						\$ 2,270,000			\$ 5,179,500		
Plus estimated values of proposed project						\$ 12,000,000			\$ 9,600,000		
Less values of any property being replaced						\$ 0			\$ 0		
Net estimated values upon completion of project						\$ 14,270,000			\$ 14,779,500		
SECTION 5						WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER					
Estimated solid waste converted (pounds) <u>0</u>						Estimated hazardous waste converted (pounds) <u>0</u>					
Other benefits Benefits will include job development and significant technological advancements and opportunities for the region. Expansion will maximize cultivation of unused land and will establish region as a nationally recognized hub of agricultural food supply and commerce generation. Developed facilities will augment the current development of the Olive St. Road Corridor project and neighboring casino property through the availability of tourism and expanding educational opportunities for area high schools, universities, and career exploration programs. Current interest in our facility has been extremely robust and we expect it will vastly increase as the facility expands, promoting tourism. Complex will produce a variety of local, fresh vegetables while maximizing environmentally sustainable, conservation friendly, and ecologically enhancing practices.											
SECTION 6						TAXPAYER CERTIFICATION					
I hereby certify that the representations in this statement are true.											
Signature of authorized representative									Date signed (month, day, year)		
Printed name of authorized representative						Title					

**FOR USE OF THE DESIGNATING BODY**

We find that the applicant meets the general standards in the resolution adopted or to be adopted by this body. Said resolution, passed or to be passed under IC 6-1.1-12.1, provides for the following limitations:

- A. The designated area has been limited to a period of time not to exceed N/A calendar years\* (*see below*). The date this designation expires is 12/31/2026. *NOTE: This question addresses whether the resolution contains an expiration date for the designated area.*
- B. The type of deduction that is allowed in the designated area is limited to:  
 1. Redevelopment or rehabilitation of real estate improvements  Yes  No  
 2. Residentially distressed areas  Yes  No
- C. The amount of the deduction applicable is limited to \$ N/A.
- D. Other limitations or conditions (*specify*) N/A
- E. Number of years allowed:  Year 1  Year 2  Year 3  Year 4  Year 5 (\* see below)  
 Year 6  Year 7  Year 8  Year 9  Year 10
- F. For a statement of benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?  
 Yes  No  
 If yes, attach a copy of the abatement schedule to this form.  
 If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

We have also 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 of designating body</i> )	Telephone number (     )	Date signed ( <i>month, day, year</i> )
Printed name of authorized member of designating body	Name of designating body <b>Common Council of the City of South Bend, Indiana</b>	
Attested by ( <i>signature and title of attester</i> )	Printed name of attester	

\* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

- A. For residentially distressed areas where the Form SB-1/Real Property was approved prior to July 1, 2013, the deductions established in IC 6-1.1-12.1-4.1 remain in effect. The deduction period may not exceed five (5) years. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. Except as provided in IC 6-1.1-12.1-18, the deduction period may not exceed ten (10) years. (See IC 6-1.1-12.1-17 below.)
- B. For the redevelopment or rehabilitation of real property where the Form SB-1/Real Property was approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. (See IC 6-1.1-12.1-17 below.)

**IC 6-1.1-12.1-17  
Abatement schedules**

**Sec. 17. (a)** A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
- (2) The number of new full-time equivalent jobs created.
- (3) The average wage of the new employees compared to the state minimum wage.
- (4) The infrastructure requirements for the taxpayer's investment.

**(b)** This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. Except as provided in IC 6-1.1-12.1-18, an abatement schedule may not exceed ten (10) years.

**(c)** An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.





**STATEMENT OF BENEFITS  
PERSONAL PROPERTY**

State Form 51764 (R5 / 1-21)

Prescribed by the Department of Local Government Finance

**FORM SB-1 / PP**

**PRIVACY NOTICE**

Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

**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.
2. The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the installation of qualifying abatable equipment for which the person desires to claim a deduction.
3. To obtain a deduction, a person must file a certified deduction schedule with the person's personal property return on a certified deduction schedule (Form 103-ERA) with the township assessor of the township where the property is situated or with the county assessor if there is no township assessor for the township. The 103-ERA must be filed between January 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 is installed and fully functional, unless a filing extension has been obtained. A person who obtains a filing extension must file the form between January 1 and the extended due date of that year.
4. Property owners whose Statement of Benefits was approved, must submit Form CF-1/PP annually to show compliance with the Statement of Benefits. (IC 6-1.1-12.1-5.6)
5. For a Form SB-1/PP that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/PP that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. (IC 6-1.1-12.1-17)

SECTION 1 TAXPAYER INFORMATION											
Name of taxpayer <b>Greenleaf Holdco LLC dba Pure Green Farms</b>					Name of contact person First Name: <b>Joe</b> Last Name: <b>McGuire</b>						
Address of taxpayer Number and Street <b>3820 W. Calvert Street</b>		City <b>South Bend</b>		State <b>IN</b>	ZIP <b>46613</b>	Telephone number <b>(863) 370-3154</b>		Email <b>jmcguire@gopgf.com</b>			
SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT											
Name of designating body <b>Common Council of the City of South Bend</b>						Resolution number (s)					
Location of property Number and Street <b>3820 W. Calvert Street</b>		City <b>South Bend</b>		State <b>IN</b>	ZIP <b>46613</b>	County <b>St. Joseph</b>		DLGF taxing district number <b>026 (South Bend-Portage)</b>			
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.)  <b>Refer to supplemental sheet</b>						ESTIMATED					
								START DATE		COMPLETION DATE	
						Manufacturing Equipment		4/1/2025		12/31/2026	
						R & D Equipment					
						Logist Dist Equipment					
IT Equipment		4/1/2025		12/31/2026							
SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT											
Current Number <b>25</b>		Salaries <b>\$ 1,650,000</b>		Number Retained <b>25</b>		Salaries <b>\$ 1,650,000</b>		Number Additional <b>75</b>		Salaries <b>\$ 2,750,000</b>	
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			\$ 21,000,000						\$ 80,000		
Plus estimated values of proposed project			\$ 70,000,000						\$ 30,000		
Less values of any property being replaced											
Net estimated values upon completion of project			\$ 91,000,000		\$ 0		\$ 0		\$ 110,000		
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER											
Estimated solid waste converted (pounds) <b>0</b>					Estimated hazardous waste converted (pounds) <b>0</b>						
Other benefits: <b>Refer to supplemental sheet</b>											
SECTION 6 TAXPAYER CERTIFICATION											
I hereby certify that the representations in this statement are true.											
Signature of authorized representative							Date signed (month, day, year)				
Printed name of authorized representative					Title						

**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 N/A calendar years \* (see below). The date this designation expires is 12/31/2026. NOTE: This question addresses whether the resolution contains an expiration date for the designated area.

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

- |  |   |  |   |
|--|---|--|---|
| 1. Installation of new manufacturing equipment;            | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No            | <input type="checkbox"/> Enhanced Abatement per IC 6-1.1-12.1-18<br>Check box if an enhanced abatement was approved for one or more of these types. |
| 2. Installation of new research and development equipment; | <input type="checkbox"/> Yes            | <input checked="" type="checkbox"/> No |   |
| 3. Installation of new logistical distribution equipment.  | <input type="checkbox"/> Yes            | <input checked="" type="checkbox"/> No |   |
| 4. Installation of new information technology equipment;   | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No            |   |

C. The amount of deduction applicable to new manufacturing equipment is limited to \$ N/A cost with an assessed value of \$ N/A. (One or both lines may be filled out to establish a limit, if desired.)

D. The amount of deduction applicable to new research and development equipment is limited to \$ N/A cost with an assessed value of \$ N/A. (One or both lines may be filled out to establish a limit, if desired.)

E. The amount of deduction applicable to new logistical distribution equipment is limited to \$ N/A cost with an assessed value of \$ N/A. (One or both lines may be filled out to establish a limit, if desired.)

F. The amount of deduction applicable to new information technology equipment is limited to \$ N/A cost with an assessed value of \$ N/A. (One or both lines may be filled out to establish a limit, if desired.)

G. Other limitations or conditions (specify) N/A

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 is allowed for:

- |                                 |                                 |                                 |                                 |  |  |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|--|--|
| <input type="checkbox"/> Year 1 | <input type="checkbox"/> Year 2 | <input type="checkbox"/> Year 3 | <input type="checkbox"/> Year 4 | <input checked="" type="checkbox"/> Year 5 | <input type="checkbox"/> Enhanced Abatement per IC 6-1.1-12.1-18<br>Number of years approved: _____<br>(Enter one to twenty (1-20) years; may not exceed twenty (20) years.) |
| <input type="checkbox"/> Year 6 | <input type="checkbox"/> Year 7 | <input type="checkbox"/> Year 8 | <input type="checkbox"/> Year 9 | <input type="checkbox"/> Year 10           |  |

I. For a Statement of Benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?  Yes  No  
If yes, attach a copy of the abatement schedule to this form.  
If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

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 by: (signature and title of authorized member of designating body)	Telephone number ( )	Date signed (month, day, year)
Printed name of authorized member of designating body	Name of designating body Common Council of the City of South Bend, Indiana	
Attested by: (signature and title of attester)	Printed name of attester	

\* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

**IC 6-1.1-12.1-17**

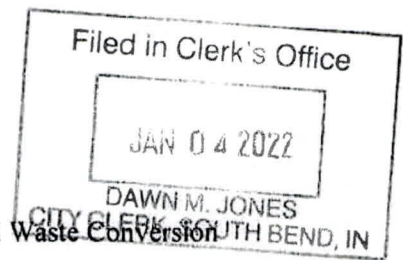
**Abatement schedules**

**Sec. 17. (a)** A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
- (2) The number of new full-time equivalent jobs created.
- (3) The average wage of the new employees compared to the state minimum wage.
- (4) The infrastructure requirements for the taxpayer's investment.

**(b)** This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. Except as provided in IC 6-1.1-12.1-18, an abatement schedule may not exceed ten (10) years.

**(c)** An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.



Pure Green Farms Supplemental Sheet  
Form SB-1/PP Section 2: Description of Manufacturing Equipment and Waste Conversion  
Benefits

Our current location in South Bend is situated strategically and employs advanced technology to promote a safe and sustainable environment in which to grow its leafy greens (additional vegetable/fruit varieties are being researched). With the use of sun and minimal reliance on artificial light, energy efficiency is maximized. The current site rests on a 64-acre purchased parcel that can potentially expand up to 300 acres.

The growing and packing systems are the most advanced in the industry, allowing for very minimal human hands touching the product. Robotics, sensors and video technology are installed throughout the greenhouse and the harvesting area. This streamlines our farm to table process and gives our customers peace of mind that they are getting their greens safely and sooner for a better-quality experience.

The current (and all future additional) greenhouses deploy advanced automated growing systems that control and regulate all processing, growing, harvesting and production evolutions in the produce cycle. The greenhouse uses innovative climate management technologies to monitor and control the heating, the lighting, the air movement, general atmosphere, and concentration of CO<sub>2</sub>.

Multiple screens in the greenhouse growing enclosures help manage light and temperature. The operations are also economically sustainable, utilizing recycling and using an estimated 90% less water compared to field grown lettuce or operating in a fully pest free environment.

As the greens grow, automated gutters move and adjust to allow for increased spacing between plants. This helps the company achieve space efficiency throughout the facility. Labor efficiency is also significantly improved through Pure Green's automatic seeding, harvesting, and packing technology.

Food safety is also top of mind at Pure Green. The indoor farm environment is pesticide-free and uses less water, meaning Pure Green's products are fresh, crisp, and offer the buy-side a long shelf life. Unique, high-quality varieties distributed to a select region maximize natural resources and minimize shrink and overall waste.

## MEMORANDUM OF AGREEMENT

### (REAL PROPERTY TAX ABATEMENT)

This Memorandum of Agreement (Agreement) dated as of January 7, 2025, serves as confirmation of a commitment by **Greenleaf Holdco LLC** (the “Applicant”), pending a January 13, 2025, public hearing, to comply with the project description, job creation and retention (and associated wage rates and salaries) figures contained in its petition, Statement of Benefits, and attachments and this Agreement.

1. Property Associated with the Abatement and Responsibilities of the Applicant. At the time of this Agreement, the property is located at 3820 West Calvert Street, South Bend, Indiana 46613, and has Key Numbers 71-08-16-400-004.000-026 and 71-08-16-400-008.000-026. Throughout the duration of the abatement, the Applicant shall promptly report any changes in the address or Key Number of the property receiving the abatement to the Department of Community Investment and to the Office of the City Clerk. Moreover, the Applicant also shall report any material changes or improvements made to the property subject to the abatement including changes as the result of subdividing, replatting, or otherwise. The Applicant agrees that failure to promptly report changes can result in a finding of noncompliance on behalf of the Applicant under the commitments of this Agreement.

2. Commitments of City and Applicant. Subject to the adoption of a Declaratory Resolution and a Confirmatory Resolution by the South Bend Common Council (the “SBCC”), the City of South Bend, Indiana, (the “City”) commits to provide a **nine-year (9) real property tax abatement** for the Applicant, based on the Applicant’s commitment set forth in its Application. The Applicant commits to the following (the “Commitments”):

(a) making total combined real property expenditures of no less than Twelve Million Dollars (\$12,000,000.00) for the construction of a new structure covering approximately 65 acres at property identified in Section 1 of this Agreement;

(b) retaining twenty-five (25) permanent full-time jobs with a total estimated annual payroll of \$1,650,000 and creating at least seventy-five (75) permanent full-time jobs with a total estimated annual payroll of \$2,750,000 within the first three years of the tax abatement. During the first year of the abatement, the Applicant’s lowest paid permanent full-time employee shall be compensated at an hourly rate of at least Fifteen Dollars (\$15.00) per hour (“Minimum Wage Rate”), and, in all subsequent years of the abatement, the Minimum Wage Rate of the Applicant shall increase by at least two percent (2%) over the previous year.

(c) acting in good faith to complete the project as described in its Application.

3. Applicant’s Compliance with City and State Laws. During the term of the abatement, the Applicant shall comply with Chapter 2, Article 6, of the South Bend Municipal Code, entitled “Tax Abatement Procedures,” and all governing provisions of the Indiana Code. During the term of this abatement, the City may annually request information from the Applicant concerning the nature of the Project, the approved capital expenditure of the Project, the number of full-time permanent positions

newly created by the Project, and the average wage rates and salaries (excluding benefits & overtime) associated with the positions, and the Applicant shall provide the City with adequate written evidence thereof within fifteen (15) days of such request (the "Annual Survey"). The City shall utilize this information and the information required to be filed by the Applicant in the CF-1 Compliance with the Statement of Benefits form to verify that the Applicant has at all times complied with the Commitments after the Commitment Date and during the duration of the abatement and for no other purpose. The Applicant further agrees to provide the City with such additional information as requested by the City to determine Applicant's compliance with the Commitments and with local and state requirements within twenty (20) days following any such request. Notwithstanding anything herein to the contrary, the Applicant acknowledges that the City may be required to disclose certain documents provided by the Applicant as required by a court order or applicable law.

4. Substantial Compliance and Rights of Termination. The City, by and through the SBCC, reserves the right to terminate the Economic Revitalization Area designation and associated property tax abatement deductions if it reasonably determines that the Applicant has not made reasonable efforts to substantially comply with all the Commitments, as defined in Section 2 of this Agreement, and the Applicant's failure to substantially comply with the Commitments was not due to factors beyond its reasonable control, as described in Section 5 below.

5. Factors Beyond Control. As used in this Agreement, factors beyond the control of the Applicant shall only include factors not reasonably foreseeable at the time of designation application and submission of Statement of Benefits which are not caused by any act or omission of the Applicant, and which materially and adversely affect the ability of the Applicant to substantially comply with this Agreement. Applicant has the burden to communicate to the City any such factors in which it believes is beyond its control and impacting its ability to fulfill the terms of this Agreement or any tax abatement benefit provided to the City. The City reserves the right to investigate the factors cited by Applicant under this Section 5 to the fullest extent possible and may deny Applicant's request upon the completion of the City's investigation.

6. Repayment of Tax Abatement Savings. If at any time during the term of this Agreement the Applicant shall: (a) be delinquent or in default with respect to any tax payment in St. Joseph County, Indiana; or (b) cease operations at the facility for which the tax abatement was granted; or (c) announce the cessation of operations at such facility, then the City may immediately terminate the Economic Revitalization Area designation and associated tax abatement deductions, and upon such termination, require Applicant to repay all of the tax abatement savings received through the date of such termination.

7. Notice/Hearing of Termination. In the event that the City determines that the Economic Revitalization Area designation and associated tax abatement deductions should be terminated or that all or a portion of the tax abatement savings should be repaid, it will give the Applicant notice of such determination, including a written statement calculating the amount due from the Applicant, and will provide the Applicant with an opportunity to meet with the City's designated representatives to show cause why the abatement should not be terminated and/or the tax savings repaid. Such notice shall state the names of the person with whom the Applicant may meet and will provide that the Applicant shall have thirty (30) days from the date of such notice to arrange such meeting and to provide its evidence concerning why the abatement termination and/or tax savings repayment should not occur.

If, after giving such notice and receiving such evidence, if any, the City determines that the abatement termination and/or the tax repayment action is proper, the Applicant shall be provided with written notice and a hearing before the SBCC before any final action shall be taken terminating the abatement and/or requiring repayment of tax benefits. The Applicant shall be entitled to appeal that determination to a St. Joseph County Superior or Circuit Court.

8. Repayment. In the event the City requires repayment of the tax abatement savings as provided hereunder, it shall provide Applicant with a written statement calculating the amount due (the "Statement"), and Applicant shall make such repayment to the City within one hundred twenty (120) days of the date of the Statement. If the Applicant does not make timely repayment, the City shall be entitled to all reasonable costs and attorneys' fees incurred in the enforcement of this Agreement and the collection of the tax abatement savings required to be repaid hereunder.

9. Voidance of Previous Agreement. This Agreement supersedes the Memorandum of Agreement dated March 10, 2022, as agreed to by the Applicant and the City.

10. Modification/Entire Agreement. This Agreement and the schedules attached hereto as Exhibit A contain the entire understanding between the City and the Applicant with respect to the subject matter hereof, and supersede all prior and contemporaneous agreements and understandings, inducements, and conditions, expressed or implied, oral, or written, except as herein contained. This Agreement may not be modified or amended other than by an agreement in writing signed by the City and the Applicant. The Applicant understands that any and all filings required to be made or actions required to be taken to initiate or maintain the abatement are solely the responsibility of the Applicant.

11. Waivers. Neither the failure nor any delay on the part of the City to exercise any right, remedy, power, or privilege under this Agreement shall operate as a waiver thereof, nor shall any single or partial exercise of any right, remedy, power, or privilege preclude any other or further exercise of the same or of any other right, remedy, power, or privilege with respect to any occurrence or be construed as a waiver of such right, remedy, power, or privilege with respect to any other occurrence. No waiver shall be effective unless it is in writing and is signed by the party asserted to have granted such waiver.

12. Notices. All notices, requests, demands, and other communications required or permitted under this Agreement shall be in writing and shall be deemed to have been received when delivered by hand or by facsimile (with confirmation by registered or certified mail) or on the third business day following the mailing, by registered or certified mail, postage prepaid, return receipt requested, thereof, addressed as set forth below:

If to Applicant:                      Greenleaf Holdco, LLC  
3820 W. Calvert St,  
South Bend, Indiana 46613  
Attn: Joe McGuire

If to the City:                              City of South Bend, Indiana  
227 W. Jefferson Boulevard, Suite 1400S  
South Bend, Indiana 46601  
Attn: Executive Director of Community Investment

13. Governing Laws of Indiana. This Agreement and all questions relating to its validity, interpretation, performance, and enforcement shall be governed by the laws and decisions of the courts of the State of Indiana.

14. Applicant's Consent to Jurisdiction. The Applicant hereby irrevocably consents to the jurisdiction of the Courts of the State of Indiana and of the St. Joseph County Circuit or Superior Court in connection with any action or proceeding arising out of or relating to this Agreement or any documents or instrument delivered with respect to any of the obligations hereunder, and any action related to this Agreement shall be brought in such County and in such Court.

15. Assignment and Transfer Prohibited. This Agreement shall be binding upon and inure to the benefit of the City and the Applicant and their successors and assigns, except (a) that no party may assign or transfer its rights or obligations under this Agreement without the prior written consent of the other party hereto, in which consent shall not be unreasonably withheld, and (b) Applicant may assign and transfer its rights under this Agreement to the Permitted Assign without prior written consent. "Permitted Assign" means the affiliated single purpose entity created for purposes of designing, constructing, owning, operating, and maintaining the project which is the subject of this Agreement.

16. Valid and Binding Agreement. This Agreement may be executed in any number of counterparts, each of which shall be deemed to be an original as against any party whose signature appears thereon, and all of which shall together constitute one and the same instrument. By executing this Agreement, each person so executing affirms that he has been duly authorized to execute this Agreement on behalf of such party and that this Agreement constitutes a valid and binding obligation of the party.

17. Severability. The provisions of this Agreement and of each section or other subdivision herein are independent of and separable from each other, and no provision shall be affected or rendered invalid or unenforceable by virtue of the fact that for any reason any other or others of them may be invalid or unenforceable in whole or in part unless this Agreement is rendered totally unenforceable thereby.

18. No Personal Liability. No official, director, officer, employee, or agent of the City shall be charged personally by the Applicant, its employees, or its agents with any liabilities or expenses of defense or be held personally liable to the Applicant under any term or provision of this Agreement or because of the execution by such party of this Agreement or because of any default by such party hereunder.

**[Remainder of page intentionally blank.]**

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year first above written.

<p>“Applicant”</p> <p>Greenleaf Holdco, LLC</p> <p>By: _____</p> <p>Joe McGuire Chief Executive Officer</p> <p>Approved as to Legal Adequacy and Form this _____ day of _____, 2025.</p> <p>Counsel, South Bend Common Council</p>	<p>“City”</p> <p>City of South Bend, Indiana</p> <p>By: _____</p> <p>Sharon McBride President, South Bend Common Council</p> <p>By: _____</p> <p>Troy Warner Chairperson, Community Investment Committee</p>
<p>_____</p> <p>Counsel for Applicant</p>	<p>By: _____</p> <p>Erik Glavich Department of Community Investment</p>
	<p>By: _____</p> <p>James Mueller Mayor</p>



**EXHIBIT A**

**Abatement Schedule**

Subject to the adoption by the SBCC of a resolution reconfirming the adoption of Declaratory Resolution No. No. 4939-22, the property owner is qualified for and is granted a real property tax abatement for a period of nine (9) years as shown by the schedule outlined below.

Year 1 - 100%  
Year 2 - 100%  
Year 3 - 100%  
Year 4 - 100%  
Year 5 - 100%  
Year 6 - 90%  
Year 7 - 80%  
Year 8 - 70%  
Year 9 - 60%

## MEMORANDUM OF AGREEMENT

### (PERSONAL PROPERTY TAX ABATEMENT)

This Memorandum of Agreement (Agreement) dated as January 7, 2025, serves as confirmation of a commitment by **Greenleaf Holdco LLC** (the “Applicant”), pending a January 13, 2025, public hearing, to comply with the project description, job creation, and retention (and associated wage rates and salaries) figures contained in its petition, Statement of Benefits, and attachments and this Agreement (Commitments).

1. Commitments of City and Applicant. Subject to the adoption of a Declaratory Resolution and a Confirmatory Resolution by the South Bend Common Council (the “SBCC”), the City of South Bend, Indiana, (the “City”) commits to provide a **five-year (5) personal property tax abatement** for the Applicant, based on the Applicant’s commitment set forth in its Application. The Applicant commits to the following (the “Commitments”):

(a) making a capital expenditure of no less than Sixty-Eight Million Dollars (\$68,000,000.00) associated with the purchase of new logistical distribution equipment for Greenleaf Holdco located at 3820 W Calvert Street, South Bend, IN 46613, and has Key Numbers 71-08-16-400-004.000-026 and 71-08-16-400-008.000-026.

(b) retaining twenty-five (25) permanent full-time jobs with a total estimated annual payroll of \$1,650,000 and creating at least seventy-five (75) permanent full-time jobs with a total estimated annual payroll of \$2,750,000 within the first three years of the tax abatement. During the first year of the abatement, the Applicant's lowest paid permanent full-time employee shall be compensated at an hourly rate of at least Fifteen Dollars (\$15.00) per hour ("Minimum Wage Rate"), and, in all subsequent years of the abatement, the Minimum Wage Rate of the Applicant shall increase by at least two percent (2%) over the previous year.

(c) acting in good faith to complete the project as described in its Application.

2. Applicant’s Compliance with City and State Laws. During the term of the abatement, the Applicant shall comply with Chapter 2, Article 6, of the South Bend Municipal Code, entitled “Tax Abatement Procedures,” and all governing provisions of the Indiana Code. During the term of this abatement, the City may annually request information from the Applicant concerning the nature of the Project, the approved capital expenditure of the Project, the number of full-time permanent positions newly created by the Project, and the average wage rates and salaries (excluding benefits & overtime) associated with the positions, and the Applicant shall provide the City with adequate written evidence thereof within fifteen (15) days of such request (the “Annual Survey”). The City shall utilize this information and the information required to be filed by the Applicant in the CF-1 Compliance with the Statement of Benefits form to verify that the Applicant has at all times complied with the Commitments after the Commitment Date and during the duration of the abatement and for no other purpose. The Applicant further agrees to provide the City with such additional information as requested by the City to determine Applicant’s compliance with the Commitments and with local and state requirements within twenty (20) days following any such request. Notwithstanding anything herein to the contrary, the Applicant acknowledges that the City may be required to disclose certain documents provided by the Applicant as required by a court order or applicable law.

3. Substantial Compliance and Rights of Termination. The City, by and through the SBCC, reserves the right to terminate the Economic Revitalization Area designation and associated property tax abatement deductions if it reasonably determines that the Applicant has not made reasonable efforts to substantially comply with all the Commitments, as defined in Section 1 of this Agreement, and the Applicant's failure to substantially comply with the Commitments was not due to factors beyond its reasonable control, as described in Section 4 below.

4. Factors Beyond Control. As used in this Agreement, factors beyond the control of the Applicant shall only include factors not reasonably foreseeable at the time of designation application and submission of Statement of Benefits which are not caused by any act or omission of the Applicant, and which materially and adversely affect the ability of the Applicant to substantially comply with this Agreement. Applicant has the burden to communicate to the City any such factors in which it believes is beyond its control and impacting its ability to fulfill the terms of this Agreement or any tax abatement benefit provided to the City. The City reserves the right to investigate the factors cited by Applicant under this Section 4 to the fullest extent possible and may deny Applicant's request upon the completion of the City's investigation.

5. Repayment of Tax Abatement Savings. If at any time during the term of this Agreement the Applicant shall: (a) be delinquent or in default with respect to any tax payment in St. Joseph County, Indiana; or (b) cease operations at the facility for which the tax abatement was granted; or (c) announce the cessation of operations at such facility, then the City may immediately terminate the Economic Revitalization Area designation and associated tax abatement deductions, and upon such termination, require Applicant to repay all of the tax abatement savings received through the date of such termination.

6. Notice/Hearing of Termination. In the event that the City determines that the Economic Revitalization Area designation and associated tax abatement deductions should be terminated or that all or a portion of the tax abatement savings should be repaid, it will give the Applicant notice of such determination, including a written statement calculating the amount due from the Applicant, and will provide the Applicant with an opportunity to meet with the City's designated representatives to show cause why the abatement should not be terminated and/or the tax savings repaid. Such notice shall state the names of the person with whom the Applicant may meet and will provide that the Applicant shall have thirty (30) days from the date of such notice to arrange such meeting and to provide its evidence concerning why the abatement termination and/or tax savings repayment should not occur. If, after giving such notice and receiving such evidence, if any, the City determines that the abatement termination and/or the tax repayment action is proper, the Applicant shall be provided with written notice and a hearing before the SBCC before any final action shall be taken terminating the abatement and/or requiring repayment of tax benefits. The Applicant shall be entitled to appeal that determination to a St. Joseph County Superior or Circuit Court.

7. Repayment. In the event the City requires repayment of the tax abatement savings as provided hereunder, it shall provide Applicant with a written statement calculating the amount due (the "Statement"), and Applicant shall make such repayment to the City within one hundred twenty (120) days of the date of the Statement. If the Applicant does not make timely repayment, the City shall be entitled to all reasonable costs and attorneys' fees incurred in the enforcement of this Agreement and the collection of the tax abatement savings required to be repaid hereunder.

8. Voidance of Previous Agreement. This Agreement supersedes the Memorandum of Agreement dated March 10, 2022, as agreed to by the Applicant and the City.

9. Modification/Entire Agreement. This Agreement and the schedules attached hereto as Exhibit A contain the entire understanding between the City and the Applicant with respect to the subject matter hereof, and supersede all prior and contemporaneous agreements and understandings, inducements, and conditions, expressed or implied, oral, or written, except as herein contained. This Agreement may not be modified or amended other than by an agreement in writing signed by the City and the Applicant. The Applicant understands that any and all filings required to be made or actions required to be taken to initiate or maintain the abatement are solely the responsibility of the Applicant.

10. Waivers. Neither the failure nor any delay on the part of the City to exercise any right, remedy, power, or privilege under this Agreement shall operate as a waiver thereof, nor shall any single or partial exercise of any right, remedy, power, or privilege preclude any other or further exercise of the same or of any other right, remedy, power, or privilege with respect to any occurrence or be construed as a waiver of such right, remedy, power, or privilege with respect to any other occurrence. No waiver shall be effective unless it is in writing and is signed by the party asserted to have granted such waiver.

11. Governing Laws of Indiana. This Agreement and all questions relating to its validity, interpretation, performance, and enforcement shall be governed by the laws and decisions of the courts of the State of Indiana.

12. Applicant's Consent to Jurisdiction. The Applicant hereby irrevocably consents to the jurisdiction of the Courts of the State of Indiana and of the St. Joseph County Circuit or Superior Court in connection with any action or proceeding arising out of or relating to this Agreement or any documents or instrument delivered with respect to any of the obligations hereunder, and any action related to this Agreement shall be brought in such County and in such Court.

13. Notices. All notices, requests, demands, and other communications required or permitted under this Agreement shall be in writing and shall be deemed to have been received when delivered by hand or by facsimile (with confirmation by registered or certified mail) or on the third business day following the mailing, by registered or certified mail, postage prepaid, return receipt requested, thereof, addressed as set forth below:

If to Applicant:	Greenleaf Holdco, LLC 3820 W Calvert St, South Bend, IN 46613  Attn: Joe McGuire, CEO

If to the City:	City of South Bend, Indiana 227 W. Jefferson Boulevard, Suite 1400S South Bend, Indiana 46601  Attn: Executive Director of Community Investment
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14. Assignment and Transfer Prohibited. This Agreement shall be binding upon and inure to the benefit of the City and the Applicant and their successors and assigns, except that no party may assign or transfer its rights or obligations under this Agreement without the prior written consent of the other party hereto, in which consent shall not be unreasonably withheld.

15. Valid and Binding Agreement. This Agreement may be executed in any number of counterparts, each of which shall be deemed to be an original as against any party whose signature appears thereon, and all of which shall together constitute one and the same instrument. By executing this Agreement, each person so executing affirms that he has been duly authorized to execute this Agreement on behalf of such party and that this Agreement constitutes a valid and binding obligation of the party.

16. Severability. The provisions of this Agreement and of each section or other subdivision herein are independent of and separable from each other, and no provision shall be affected or rendered invalid or unenforceable by virtue of the fact that for any reason any other or others of them may be invalid or unenforceable in whole or in part unless this Agreement is rendered totally unenforceable thereby.

17. No Personal Liability. No official, director, officer, employee, or agent of the City shall be charged personally by the Applicant, its employees, or its agents with any liabilities or expenses of defense or be held personally liable to the Applicant under any term or provision of this Agreement or because of the execution by such party of this Agreement or because of any default by such party hereunder.

**[Remainder of page intentionally blank.]**

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year first above written.

<p>“Applicant”</p> <p>Greenleaf Holdco LLC</p> <p>By: _____</p> <p>Joe McGuire Chief Executive Officer</p> <p>Approved as to Legal Adequacy and Form this _____ day of _____, 2025.</p> <p>Counsel, South Bend Common Council</p>	<p>“City”</p> <p>City of South Bend, Indiana</p> <p>By: _____</p> <p>Sharon McBride President, South Bend Common Council</p> <p>By: _____</p> <p>Troy Warner Chairperson, Community Investment Committee</p> <p>By: _____</p> <p>Erik Glavich Department of Community Investment</p> <p>By: _____</p> <p>James Mueller Mayor</p>
<p>Counsel for Applicant</p>	

**EXHIBIT A**

**Abatement Schedule**

Subject to the adoption by the SBCC of a resolution reconfirming the adoption of Declaratory Resolution No. No. 4944-22, the property owner is qualified for and is granted a personal property tax abatement for a period of five (5) years as shown by the schedule outlined below.

Year 1 - 100%  
Year 2 - 100%  
Year 3 - 100%  
Year 4 - 100%  
Year 5 - 100%

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# RESOLUTION

No. 4939-22

Passed by the Common Council of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ January 24, 20 22 .

Attest: *Dawn M. Jones* \_\_\_\_\_ City Clerk  
Dawn M. Jones

Attest: *Sharon L. McBride* \_\_\_\_\_ President of Common Council

Presented by me to the Mayor of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ January 25, 20 22 .

*Dawn M. Jones* \_\_\_\_\_ City Clerk  
Dawn M. Jones

Approved and signed by me \_\_\_\_\_ January 26, 20 22 .

\_\_\_\_\_ *J. M. H.* \_\_\_\_\_ Mayor

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**BILL NO. 22-04**

**RESOLUTION NO. 4939-22**

**A RESOLUTION OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND  
DESIGNATING CERTAIN AREAS WITHIN THE CITY OF SOUTH BEND, INDIANA,  
COMMONLY KNOWN AS 3820 W CALVERT STREET, SOUTH BEND IN 46613 AN  
ECONOMIC REVITALIZATION AREA FOR PURPOSES OF A NINE (9) YEAR REAL  
PROPERTY TAX ABATEMENT FOR GREENLEAF HOLDCO**

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WHEREAS, a petition for real property tax abatement has been filed with the City Clerk for consideration by the Common Council of the City of South Bend, Indiana requesting that the area located at 3820 W Calvert Street, South Bend IN 46613, which is more particularly described as:

*Parcel ID: 018-8112-4237*  
*Parcel Number: 71-08-16-400-004.000-026*  
*Leal Description: SW SE S OF CALVERT ST 40 AC 16 37 2E*

*Parcel ID: 018-1007-0223*  
*Parcel Number: 71-08-16-400-008.000-026*  
*Legal Description: SE SW1/4 N1271', W589', SW1349', E1175' Sec 16-37-2e 20/21 Split 32329 6/28/2019 to 022301 19/20 ANNEX #10625-18 10/26/18 from 017-1007-0223*

and which has Key Numbers 018-8112-4237 and 018-1007-0223 be designated as an Economic Revitalization Area under the provisions of Indiana Code § 6-1.1-12.1 et seq., and South Bend Municipal Code Sections 2-76 et seq., and;

WHEREAS, petitioner has agreed to and has accepted responsibility to report any changes in the final legal description and to report the final, appropriate Key Number to the Department of Community Investment and to the Office of the City Clerk; and

WHEREAS, the Department of Community Investment has concluded an investigation and prepared a report with information sufficient for the Common Council to determine that the area qualifies as an Economic Revitalization Area under Indiana Code § 6-1.1-12.1, et seq., and South Bend Municipal Code Sections 2-76, et seq., and has further prepared maps and plats showing the boundaries and such other information regarding the area in question as required by law; and

WHEREAS, the Community Investment Committee of the Common Council has reviewed said report and recommended to the Common Council that the area qualifies as an Economic Revitalization Area.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

SECTION I. The Common Council hereby determines and finds that the Petition for Real Property Tax Abatement and the Statement of Benefits form completed by the Petitioner meet the requirements of Indiana Code § 6-1.1-12.1 et seq., for tax abatement.

SECTION II. The Common Council hereby determines and finds the following:

- A. That the description of the proposed redevelopment or rehabilitation meets the applicable standards for such development;
- B. That the estimate of the value of the redevelopment or rehabilitation is reasonable for projects of this nature;
- C. That the estimate of the number of individuals who will be employed or whose employment will be retained by the Petitioner can reasonably be expected to result from the

proposed described redevelopment or rehabilitation;

D. That the estimate of the annual salaries of those individuals who will be employed or whose employment will be retained by the Petitioner can be reasonably expected to result from the proposed redevelopment or rehabilitation;

E. That the other benefits about which information was requested are benefits that can be reasonably expected to result from the proposed described redevelopment or rehabilitation; and

F. That the totality of benefits is sufficient to justify the requested deduction, all of which satisfy the requirements of Indiana Code § 6-1.1-12.1-3.

SECTION III. The Common Council hereby determines and finds that the proposed described redevelopment or rehabilitation can be reasonably expected to yield benefits identified in the Statement of Benefits, Sections 1 through 3 of the Petition for Real Property Tax Abatement Consideration and the Memorandum of Agreement between the Petitioner and the City of South Bend, and that the Statement of Benefits form completed by the petitioner, said form being prescribed by the State Board of Accounts, are sufficient to justify the deduction granted under Indiana Code § 6-1.1-12.1-3.

SECTION IV. The Common Council hereby accepts the report and recommendation of the Community Investment Committee that the area herein described be designated as an Economic Revitalization Area and hereby adopts a Resolution designating this area as an Economic Revitalization Area for purposes of real property tax abatement.

SECTION V. The designation as an Economic Revitalization Area shall be limited to three (3) calendar years from the date of the adoption of this Resolution by the Common Council.

SECTION VI. The Common Council hereby determines that the property owner is qualified for and is granted property tax deduction for a period of nine (9) years as shown by the schedule outlined below as well as the attachment pursuant to Indiana Code 6-1.1-12.1-17.

Year 1 - 100%  
Year 2 - 100%  
Year 3 - 100%  
Year 4 - 100%  
Year 5 - 100%  
Year 6- 90%  
Year 7- 80%  
Year 8 - 70%  
Year 9 - 60%

SECTION VII. The Common Council directs the City Clerk to cause notice of the adoption of this Declaratory Resolution for Real Property Tax Abatement to be published pursuant to Indiana Code § 5-3-1 and Indiana Code § 6-1.1-12.1-2.5, said publication providing notice of the public hearing before the Common Council on the proposed confirming of said declaration.

SECTION VIII. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approval by the Mayor.



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Sharon L. McBride, President  
South Bend Common Council

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# RESOLUTION

No. 4941-22

Passed by the Common Council of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ February 14, \_\_\_\_\_ 20 22.

Attest: *Dawn M. Jones* City Clerk  
Dawn M. Jones

Attest: *Sharon L. McBride* President of Common Council

Presented by me to the Mayor of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ February 14, \_\_\_\_\_ 20 22

*Dawn M. Jones* City Clerk  
Dawn M. Jones

Approved and signed by me \_\_\_\_\_ February 21 \_\_\_\_\_ 20 22

*J. M. M.* Mayor

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**BILL NO. 22-05**

**RESOLUTION NO. 4941-22**

**A RESOLUTION CONFIRMING THE ADOPTION OF A DECLARATORY  
RESOLUTION DESIGNATING CERTAIN AREAS WITHIN THE CITY OF SOUTH  
BEND, INDIANA, COMMONLY KNOWN AS 3820 W CALVERT STREET, SOUTH  
BEND IN 46613 AS AN ECONOMIC REVITALIZATION AREA FOR  
PURPOSES OF A NINE (9) YEAR REAL  
PROPERTY TAX ABATEMENT FOR  
GREENLEAF HOLDCO**

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WHEREAS, the Common Council of the City of South Bend, Indiana, has adopted a Declaratory Resolution designating certain areas within the City as Economic Revitalization Areas for the purpose of tax abatement consideration; and

WHEREAS, a Declaratory Resolution designated the area commonly known as 3820 W Calvert Street, South Bend IN 46613, and which is more particularly described as follows:

*Parcel ID: 018-8112-4237*  
*Parcel Number: 71-08-16-400-004.000-026*  
*Leal Description: SW SE S OF CALVERT ST 40 AC 16 37 2E*

*Parcel ID: 018-1007-0223*  
*Parcel Number: 71-08-16-400-008.000-026*  
*Legal Description: SE SW1/4 N1271', W589', SW1349', E1175' Sec 16-37-2e 20/21 Split 32329 6/28/2019 to 022301 19/20 ANNEX #10625-18 10/26/18 from 017-1007-0223*

and which has Key Numbers 018-8112-4237 and 018-1007-0223 be designated as an Economic Revitalization Area; and

WHEREAS, notice of the adoption of a Declaratory Resolution and the public hearing before the Council has been published pursuant to Indiana Code 6-1.1-12.1-2.5; and

WHEREAS, the Council held a public hearing for the purposes of hearing all remonstrances and objections from interested persons; and

WHEREAS, the Council has determined that the qualifications for an economic revitalization area have been met.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

SECTION I. The Common Council hereby confirms its Declaratory Resolution designating the area described herein as an Economic Revitalization Area for the purposes of tax abatement. Such designation is for Real property tax abatement only and is limited to three (3) calendar years from the date of adoption of the Declaratory Resolution by the Common Council.

SECTION II. The Common Council hereby determines that the property owner is qualified for and is granted Real property tax deduction for up to a period of nine (9) years as shown by the schedule outlined below as well as the attachment pursuant to Indiana Code 6-1.1-12.1-17 and further determines that the petition, the Memorandum of Agreement between the Petitioner and the City of South Bend, and the Statement of Benefits comply with Chapter 2, Article 6, of the Municipal Code of the City of South Bend and Indiana Code 6-1.1-12 et seq.

Year 1 - 100%  
Year 2 - 100%

Year 3 - 100%

Year 4 - 100%

Year 5 - 100%

Year 6- 90%

Year 7- 80%

Year 8 - 70%

Year 9 - 60%

SECTION III. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approved by the Mayor.



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Sharon L. McBride, President  
South Bend Common Council

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# RESOLUTION

No. 4944-22

Passed by the Common Council of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ January 24, \_\_\_\_\_ 20 22 .

Attest: Dawn M. Jones \_\_\_\_\_ City Clerk  
Dawn M. Jones

Attest: Sharon L. McBride \_\_\_\_\_ President of Common Council

Presented by me to the Mayor of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ January 25, \_\_\_\_\_ 20 22 .

Dawn M. Jones \_\_\_\_\_ City Clerk  
Dawn M. Jones

Approved and signed by me \_\_\_\_\_ January 26, \_\_\_\_\_ 20 22 .

J. M. H. \_\_\_\_\_ Mayor

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**BILL NO. 22-08**

**RESOLUTION NO. 4944-22**

**A RESOLUTION OF THE COMMON COUNCIL OF THE  
CITY OF SOUTH BEND DESIGNATING CERTAIN AREAS WITHIN  
THE CITY OF SOUTH BEND, INDIANA, COMMONLY KNOWN AS 3820 W  
CALVERT, SOUTH BEND IN 46613 AN ECONOMIC REVITALIZATION AREA FOR  
PURPOSES OF A (5) FIVE-YEAR PERSONAL PROPERTY TAX ABATEMENT FOR  
GREENLEAF HOLDCO**

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WHEREAS, a petition for personal property tax abatement consideration has been filed with the City Clerk for consideration by the Common Council of the City of South Bend, Indiana, requesting that the area commonly known as 3820 W Calvert Street, South Bend IN 46613, and which is more particularly described as follows:

**Business Personal Property**

and which has Key Numbers to be assigned, be designated as an Economic Revitalization Area under the provisions of Indiana Code 6-1.1-12.1 et seq., and South Bend Municipal Code Sections 2-76 et seq., and;

WHEREAS, the Department of Community Investment has concluded an investigation and prepared a report with information sufficient for the Common Council to determine that the area qualifies as an Economic Revitalization Area under Indiana Code 6-1.1-12.1, et seq., and South Bend Municipal Code Sections 2-76, et seq., and has further prepared maps and plats showing the boundaries and such other information regarding the area in question as required by law; and

WHEREAS, the Community Investment Committee of the Common Council has reviewed said report and recommended to the Common Council that the area qualifies as an Economic Revitalization Area.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

SECTION I. The Common Council hereby determines and finds pursuant to Indiana Code 6-1.1-12.1-4.5 et seq., that:

- a. The estimate of the cost of the new logistical distribution equipment including but not limited to conveyors, scanning and moving equipment, packaging equipment, sorting and picking equipment is reasonable for equipment of that type;
- b. That the estimate of the number of individuals that will be employed or whose employment will be retained by the Petitioner can reasonably be expected to result from the proposed installation of new logistical distribution equipment;
- c. That the estimate of the annual salaries of those individuals that will be employed or whose employment will be retained by the Petitioner can be reasonably expected to result from the proposed installation of new logistical distribution equipment;
- d. Any other benefits about which information was requested are benefits that can be reasonably expected to result from the proposed new logistical distribution equipment; and
- e. The totality of benefits is sufficient to justify the deduction requested.

SECTION II. The Common Council hereby determines and finds that the proposed new logistical distribution equipment can be reasonably expected to yield the benefits identified in the Statement of Benefits as set forth in Sections 1 through 3 of the Petition for Personal Property Tax Abatement Consideration and that Statement of Benefits form completed by the petitioner, said form being prescribed by the State Board of Accounts, are sufficient to justify the deduction granted under Indiana Code 6-1.1-12.1-4.5.

SECTION III. The Common Council hereby accepts the report and recommendation of the Department of Community Investment, and the Community Investment Committee's favorable recommendation, that the area herein described be designated as an Economic Revitalization Area

for purposes of personal property tax abatement and hereby makes such a designation.

SECTION IV. The Common Council determines that such designation is for personal property tax abatement only and shall be limited to three (3) calendar years from the date of the adoption of this Resolution by the Common Council.

SECTION V. The Common Council hereby determines that the property owner is qualified for and is granted property tax deduction for a period of (5) five years as shown below pursuant to Indiana Code 6-1.1-12.1-17.

Year 1-100%  
Year 2- 100%  
Year 3- 100%  
Year 4- 100%  
Year 5- 100%

SECTION VI. The Common Council directs the City Clerk to cause notice of the adoption of this Declaratory Resolution for Personal Property Tax Abatement to be published pursuant to Indiana Code 5-3-1, said publication providing notice of the public hearing before the Common Council on the proposed confirming of said declaration.

SECTION VII. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approval by the Mayor.



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Sharon L. McBride, President  
South Bend Common Council



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# RESOLUTION

No. 4945-22

Passed by the Common Council of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ February 14, \_\_\_\_\_ 20 22.

Attest: *Dawn M. Jones* \_\_\_\_\_ City Clerk  
Dawn M. Jones

Attest: *Sharon L. McBride* \_\_\_\_\_ President of Common Council

Presented by me to the Mayor of the City of South Bend, Indiana \_\_\_\_\_

\_\_\_\_\_ February 14, \_\_\_\_\_ 20 22

*Dawn M. Jones* \_\_\_\_\_ City Clerk  
Dawn M. Jones

Approved and signed by me February 21, \_\_\_\_\_ 20 22

*F. M. H.* \_\_\_\_\_ Mayor

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**BILL NO. 22-09**

**RESOLUTION NO. 4945-22**

**A RESOLUTION CONFIRMING THE ADOPTION OF A DECLARATORY RESOLUTION DESIGNATING CERTAIN AREAS WITHIN THE CITY OF SOUTH BEND, INDIANA, COMMONLY KNOWN AS 3820 W CALVERT STREET, SOUTH BEND IN AS AN ECONOMIC REVITALIZATION AREA FOR PURPOSES OF A FIVE (5) YEAR PERSONAL PROPERTY TAX ABATEMENT FOR GREENLEAF HOLDCO**

---

WHEREAS, the Common Council of the City of South Bend, Indiana, has adopted a Declaratory Resolution designating certain areas within the City as Economic Revitalization Areas for the purpose of tax abatement consideration; and

WHEREAS, a Declaratory Resolution designated the area commonly known as 3820 W Calvert Street, South Bend IN 46613 and which is more particularly described as follows:

**Business Personal Property**

and which has Key Numbers to be assigned, be designated as an Economic Revitalization Area; and

WHEREAS, notice of the adoption of a Declaratory Resolution and the public hearing before the Council has been published pursuant to Indiana Code 6-1.1-12.1-2.5; and

WHEREAS, the Council held a public hearing for the purposes of hearing all remonstrances and objections from interested persons; and

WHEREAS, the Council has determined that the qualifications for an economic revitalization area have been met.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of South Bend, Indiana, as follows:

SECTION I. The Common Council hereby confirms its Declaratory Resolution designating the area described herein as an Economic Revitalization Area for the purposes of tax abatement. Such designation is for personal property tax abatement only and is limited to three (3) calendar years from the date of adoption of the Declaratory Resolution by the Common Council.

SECTION II. The Common Council hereby determines that the property owner is qualified for and is granted personal property tax deduction for a period of five (5) years as shown below pursuant to Indiana Code 6-1.1-12.1-17 and further determines that the petition, the Memorandum of Agreement between the Petitioner and the City of South Bend, and the Statement of Benefits comply with Chapter 2, Article 6, of the Municipal Code of the City of South Bend and Indiana Code 6-1.1-12 et seq.

Year 1-100%

Year 2- 100%

Year 3- 100%

Year 4- 100%

Year 5- 100%

SECTION III. This Resolution shall be in full force and effect from and after its adoption by the Common Council and approved by the Mayor.

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*Sharon L. McBride*

Sharon L. McBride, President  
South Bend Common Council



# CITY OF SOUTH BEND

## COMMUNITY INVESTMENT

Santiago Garces, Executive Director

January 19, 2022

Council Member Rachel Tomas Morgan, Chairperson  
Community Investment Committee  
South Bend Common Council  
4th Floor, County City Building  
South Bend, IN 46601

RE: Real & Personal Property Tax Abatement Petition for: **Greenleaf HoldCo**

Dear Council Member Tomas Morgan:

Please find the attached information pertaining to a real and personal property tax abatement petition submitted by Greenleaf HoldCo to build a new production facility at 3820 W Calvert Street, South Bend, IN 46613 and purchase new logistical distribution equipment. This petition package includes:

- Department of Community Investment's summary report
- Petition
- Statement of Benefits forms (Real and Personal properties)
- Supporting information

The report contains the Department's findings relative to the above petition. The petitioner proposes to invest approximately \$12,000,000 in new construction and purchase new logistical distribution equipment with estimated cost of \$68,000,000. A total project cost is approximately \$80,000,000. A representative from Greenleaf HoldCo will be available to meet with the Committee on Monday, January 24, 2022.

Should you or any of the other Council members have any questions concerning the report, or need additional information, please feel free to call me at 574-235-5838.

Sincerely,

Angelina Billo

Director of Business Development

## **TAX ABATEMENT REPORT**

TO: South Bend Common Council

FROM: Angelina Billo, Director of Business Development

SUBJECT: REAL & PERSONAL PROPERTY TAX ABATEMENT PETITION FOR:  
**Greenleaf HoldCo**

DATE: January 19, 2022

On Tuesday, January 4, 2022, a petition from Greenleaf HoldCo was received and subsequently filed with the City Clerk for real and personal property tax abatements consideration for property located at 3820 W Calvert Street, South Bend, IN 46613. Pursuant to Chapter 2, Article 6, Section 2-84.2 of the Municipal Code of the City of South Bend, this petition was referred to the Department of Community Investment for purposes of investigation and preparation of a report determining whether the area qualifies as an Economic Revitalization Area pursuant to I.C.6-1.1-12.1 and whether all zoning requirements have been met.

The Department of Community Investment has reviewed the petition (a copy of which is attached), investigated the area, and makes the following report.

### **PROJECT SUMMARY**

- Pure Green Farms (“Pure Green”) was founded by Ceres Partners, South Bend and has since garnered investments from Taylor Farms Inc. and Paul J. Mastronardi (a principal owner of Red Sun Farms).
- Greenleaf Holdco, LLC owns 64.12 acres, but has the ability to expand into the entire nearly 300-acre site via its relationship and mutual ownership with Ceres Partners. Pure Green currently sells to Martins, Kroger, Spartan Nash, Tony’s Fresh Markets, Walt’s Markets, Stanz’s Food Service, Performance Food Service and to LaRosa’s to name a few.
- The existing facility in South Bend consist of 3.5 acres of greenhouse, a main building used for planting, harvesting and cold storage, and another building that houses the boilers and irrigation.
- The current facility has the capability to produce 2 million pounds of lettuce per year and is well on its way to having its production being fully subscribed. Unique to Pure Green is the fact that their planting, grow and harvesting operation is 100% automated and fully staffed with local personnel.
- Greenleaf HoldCo proposes to invest approximately \$12m in new production facilities and \$68m in new logistical distribution equipment including but not limited to conveyors, scanning and moving equipment, packaging equipment, sorting and picking equipment.
- The additional phases of greenhouse builds are planned to be approximately 4.2 acres each, plus additional ancillary buildings. The total lettuce production for all four phases will be approximately 8 million lbs. annually.

### EMPLOYMENT IMPACT

Per this petition, it is estimated that the company will:

- Retain twenty-five (25) permanent full-time jobs representing a total annual payroll of \$1,650,000 and create, at least, seventy-five (75) new full-time jobs with an estimated total annual payroll of \$2,750,000.

### ABATEMENT QUALIFICATION

1. A review of the tax abatements previously granted, finds that the petitioner has not been granted any tax abatements.
2. The Area Plan Commission has reviewed the petition and finds the property to be properly zoned for the proposed project.
3. A review of the South Bend Redevelopment designation areas finds that the property is located in the River West Development Area.
4. A review of the Tax Abatement Ordinance No. 9394-03 finds that the petitioner meets the qualifications for **the nine (9) year real property** and **five (5) year personal property tax abatements** under section 2-82.1, Industrial development in Urban Enterprise Zone and Redevelopment Blighted Areas, and section 2-84.2, Tangible Personal Property Tax Abatement.

# City of South Bend Petition for Incentives



*Petition must include a \$250 filing fee payable to the City Clerk's Office or online via the City's website at <http://southbendin.gov/government/content/tax-abatement> before processing can be complete*

General Information		Project Name	Project Number
Legal name as registered with Secretary of State		Greenleaf Holdco	
Business structure		Corporation	
Company website		<a href="http://www.enjoypuregreen.com/">http://www.enjoypuregreen.com/</a>	
Proposed Project Information			
Proposed project address		3820 W. Calvert St.	Parent company name N/A
City, State, Zip	South Bend, IN 46613	Legal owner	Greenleaf Holdco
Site acreage or acreage required	65	Is the real estate owned or leased	Owned
Square feet of facility		If leased by whom	
Primary Contact Information			
Primary company contact name		Joe McGuire	Title CEO
Address of company contact		3820 W. Calvert St.	Phone 863-370-3154
City, State, Zip	South Bend, IN 46613	Email	jmguire@gopgf.com
Senior Official Information			
Company senior official name		Joe McGuire	Title
Address of company contact (If different from above)			Phone
City, State, Zip			Email
Consultant Information/Agent			
Hired business consultant/agent name		Agra Greenhouse Group LLC/ Greg Elam	Consultant release (Y/N) Y
Address		2012 Hebron Trace Drive	Local economic development partners approval (Y/N) Y
City, State, Zip	Nolensville, TN 37135	Email	greg@agragreenhousegroup.com
Project Overview			
Brief description of your company, project, and why the property is necessary for economic growth	<p>Our purpose is to grow fresh produce responsibly through innovative farming. Pure Green Farms currently operates a four acre, state of the art hydroponic greenhouse farming facility that produces four kinds of fresh lettuce for retail and wholesale consumption, 365 days a year. The current facility rests on 65 acres of owned farmland in Southwest South Bend, IN. The existing greenhouse has the target capacity to produce about two million pounds of lettuce a year and seeks to expand operations, exploring options for building additional greenhouses to grow and sell additional lettuce and/or produce.</p>		
Certified Technology Park appropriate	No		
Is the project in a Tax Incremental Financing (TIF) area? If so, which?	Yes		
Certify that the Building Permit has not been issued (Y/N)	Yes	Number of residential units created by project	
If this is a petition for personal property tax abatement, has the equipment been installed	No		

Filed in Clerk's Office

JAN 04 2022

DAWN M. JONES  
CITY CLERK, SOUTH BEND, IN

Investment Details			
Public infrastructure needs (Off-site of project in dollars)	Has any 504 funding been received?	What is the value of any equipment being purchased in Indiana for the project?	What is the value of any equipment being purchased from out of state for the project?
500,000			

New Project Investments								
Calendar Year	2021	2022	2023	2024	2025	2026	2027	2028
Land Acquisition								
Building Lease Payments								
Building Purchase Costs								
New Building Construction		\$ 4,000,000.00	\$ 4,000,000.00	\$ 4,000,000.00				
Existing Building Improvements								
New Machinery & Equipment		\$ 27,200,000.00	\$ 24,000,000.00	\$ 17,000,000.00				
Special Tooling/Retrofitting		\$ 100,000.00						
New Furniture/Fixtures		\$ 30,000.00						
New Computer/IT Hardware		\$ 20,000.00						
New Software		\$ 20,000.00						
On-site Rail Infrastructure								
On-site Fiber Infrastructure								
<b>TOTAL</b>	<b>\$ 0.00</b>	<b>\$ 31,370,000.00</b>	<b>\$ 28,000,000.00</b>	<b>\$ 21,000,000.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>

Full-Time Permanent Indiana-Resident Positions by Calendar Year						
Calendar Year	Jobs retained	Total hourly wage w/o fringe or bonuses	Cumulative # of net NEW full time permanent jobs created at project	Hourly average wage, w/o benefits or bonuses, of cumulative net new jobs	Total training expenditure - not cumulative	Total # to be trained - not cumulative
2021						
2022			45	24.34	32000	35
2023			75	24.34	45000	50
2024			105	24.34	45000	50
2025						
2026						
2027						
2028						
2029						
2030						
2031						
2032						

Provide hourly wage information for new employees in the following positions.		
	Full time	Part time
Laborers	15	15
Technical	20	20
Managerial	17	17
Administrative	20	20

Who will be the individual responsible for coordinating with WorkOne on recruiting?	Jay Paciorek
Does your company have an EEO hiring policy?	Y
Are you an EEO employer?	Y

Please list the number of full time and part time minority and/or female employees for each of the last three years:						Please describe your commitment to diversity and inclusion by detailing your outreach and recruitment efforts for the last three years as well as current policies.	
Year	2020		2019		2018		
	Full Time	Part Time	Full Time	Part Time	Full Time		Part Time
Black							<p>General Hotel LLC does not discriminate in employment opportunities or practices on the basis of race, color, religion, disability, national origin, genetic information, sex (including pregnancy), age, sexual orientation, gender, marital status, protected veterans status, citizenship status or any other characteristics prohibited by applicable law.</p> <p>General Hotel LLC strives to create and maintain a work environment in which employees are treated with dignity, decency and respect. Through its policies and practices, the environment of the company strives to create mutual trust and the absence of intimidation, oppression and exploitation.</p> <p>Please note that Company only had 6 employees at the end of 2020</p>
Hispanic							
Asian							
Indian							
Female	1						
Other							




**Complete below for Real or Personal Property Tax Abatement only.  
Please sign for all requested incentives.**

**Public Benefit Item:**

Information is required on both the construction companies and the companies which will provide materials purchased for this project. Please complete the table below with the appropriate information. If you qualify for the points, please enter the full amount of available points.		Qualify (Yes or No)	Earned Points	Available Points	
1	<b>Construction Related (Contractors):</b>				
	A.	Employ Local Companies (75%)	Y	20	20
	B.	Purchase Materials from Local Companies (75%)	Y	20	20
	C.	Require Employees vs. Independent Contractors	Y	20	19
	D.	Require Prevailing Wage (Davis Bacon)	N		22
	E.	Require Health Benefits	N		22
	F.	Require Pension Benefits	N		18
	G.	Maintain Affirmative Action Plan	Y	20	20
		<b>Sub-total Construction Related:</b>		<b>80</b>	<b>141</b>
2	<b>Wage &amp; Benefit Related (Owner):</b>				
	A.	Pay Target Wage Levels	Y	33	33
	B.	Provide Health Benefits	Y	34	34
	C.	Provide Pension Benefits (401K w/match)	Y	29	29
	D.	Provide Training	Y	28	28
	E.	Provide Child Care	N		15
	F.	Provide Transportation Assistance	N		14
	G.	Provide Employer Assisted Housing program	N		9
	<b>Sub-total Wage &amp; Benefit Related:</b>		<b>124</b>	<b>162</b>	
3	<b>Workforce Related:</b>				
	A.	Create New Jobs	Y	42	42
	B.	Retain Existing Jobs	Y	41	41
	C.	Maintain Affirmative Action Plan	Y	35	35
	D.	Provide Targeted Hiring Preference			34
	<b>Sub-total Workforce Related:</b>		<b>118</b>	<b>152</b>	
4	<b>Support a Municipal Facility:</b>				
	A.	Support a SB Municipal Facility (donations to the zoo, conservatory, museum, etc.)	Y	84	84
	Name of Facility	South Bend Venues, Parks & Arts			
	<b>Sub-total Municipal Facility:</b>		<b>84</b>	<b>84</b>	
<b>Sub-total from Above:</b>			<b>406</b>	<b>539</b>	

The undersigned owner(s) of real property located within the City of South Bend, hereby petition the Common Council of the City of South Bend for a real and/or personal property tax abatement consideration and pursuant to I.C., 6-1.1-12.1-1, et seq., and South Bend Municipal Code Sec. 2-76 et seq., for this petition state the above.

Submitted By:  Date: December 24, 2021

For Staff Use Only Below This Line				
What is the current assessed value?	Real Property:	\$65,600	Personal Property:	
What is the projected assessed value?	Real Property:		Personal Property:	
What is the tax key number for this project?	018-8112-4237 and 018-1007-0223			
What is the six digit NAICS code?	111419			
Please attach a Google map and street view of the location.				
Please list the amount of real and personal property taxes paid for the last five years when applicable.		Real Property Taxes:	Personal Property Taxes:	
Pay 2021	Year One	\$1,651		
Pay 2020	Year Two	\$2,950		
	Year Three			
	Year Four			
	Year Five			
Please fill out the following Public Benefit Summary Information and add to total from above.				
		(Y or N)	Points	Points
Public Benefit Item:				
<u>Project Related:</u>				
5	A.	Redevelop a Site that has Special Needs		49
	B.	Develop Based on Local University Research		35
	C.	Achieve a Physical Element of a Plan		36
	Sub-total Project Related:			120
6	<u>Super Size Projects (point values are cumulative):</u>			
	A.	100% to 199%	Y	25
	B.	200% to 299%	Y	68
	C.	300% to 399%	Y	65
	D.	400% and Over	Y	52
Sub-total Super Size Projects:			210	210
7	<u>Pay for Municipal Infrastructure:</u>			
	A.	Pay for Oversizing or Upgrading		14
	B.	Pay for 26-50% of Extension Cost		26
	C.	Pay for 51-75% of Extension Cost		39
	D.	Pay for 76-100% of Extension Cost		52
Sub-total Infrastructure Related:				131
Total from Applicant Section:			406	539
Total from Staff Section:			210	461
Total Public Benefit Points:			616	1000

Filed in Clerk's Office  
 JAN 04 2022  
 DAWN M. JONES  
 CITY CLERK, SOUTH BEND, IN



**STATEMENT OF BENEFITS  
 REAL ESTATE IMPROVEMENTS**

State Form 51787 (R6 / 10-14)  
 Prescribed by the Department of Local Government Finance

20__ PAY 20__
FORM SB-1 / Real Property
<b>PRIVACY NOTICE</b>
Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

This statement is being completed for real property that qualifies under the following Indiana Code (check one box):  
 Redevelopment or rehabilitation of real estate improvements (IC 6-1.1-12.1-4)  
 Residentially distressed area (IC 6-1.1-12.1-4.1)

**INSTRUCTIONS:**

- 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.
- The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the initiation of the redevelopment or rehabilitation for which the person desires to claim a deduction.
- To obtain a deduction, a Form 322/RE must be filed with the County Auditor before May 10 in the year in which the addition to assessed valuation is made or not later than thirty (30) days after the assessment notice is mailed to the property owner if it was mailed after April 10. A property owner who failed to file a deduction application within the prescribed deadline may file an application between March 1 and May 10 of a subsequent year.
- A property owner who files for the deduction must provide the County Auditor and designating body with a Form CF-1/Real Property. The Form CF-1/Real Property should be attached to the Form 322/RE when the deduction is first claimed and then updated annually for each year the deduction is applicable. IC 6-1.1-12.1-5.1(b)
- For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/Real Property that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. IC 6-1.1-12.1-17

SECTION 1 TAXPAYER INFORMATION						
Name of taxpayer Greenleaf Holdeo, LLC dba Pure Green Farms						
Address of taxpayer (number and street, city, state, and ZIP code) 3820 W. Calvert						
Name of contact person Joe McGuire, CEO			Telephone number (863) 370-3154		E-mail address jmcguire@gopgf.com	
SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT						
Name of designating body City of South Bend/St. Joseph's County					Resolution number	
Location of property 3820 W. Calvert South Bend, IN 46613			County St. Joseph		DLGF taxing district number 026 South Bend (Portage)	
Description of real property improvements, redevelopment, or rehabilitation (use additional sheets if necessary) Continued development of 64 acre parcel of unused farmland into state-of-the-art hydroponic greenhouse complex. Expand existing 4 acre facility by adding additional vegetable growing greenhouses. Estimate between 15 to 20 more acres of the unused property can be transformed into an environmentally sustainable and esthetically pleasing agricultural showpiece and manufacturing hub that will produce and distribute fresh produce for the entire midwest region.					Estimated start date (month, day, year) 1/1/22	
					Estimated completion date (month, day, year) 12/31/24	
SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT						
Current number 25	Salaries 1.65M/Year	Number retained 25	Salaries 1.65M/Year	Number additional 75	Salaries 2.75M/Year	
SECTION 4 ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT						
<b>REAL ESTATE IMPROVEMENTS</b>						
			COST		ASSESSED VALUE	
Current values			2.27M		In Progress	
Plus estimated values of proposed project			12M		-- --	
Less values of any property being replaced			-----		-- --	
Net estimated values upon completion of project			14.27M		-- --	
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER						
Estimated solid waste converted (pounds) Variable but will increase annually			Estimated hazardous waste converted (pounds) N/A			
Other benefits Benefits will include job development, and significant technological advancements and opportunities for the region. Expansion will maximize utilization of unused land and will establish region as a nationally recognized hub of agricultural food supply and commerce generation. Developed facilities will augment the current development of the Olive St. Road Corridor project and neighboring casino property, through the availability of touring and expanding educational opportunities for area high schools, universities and career exploration programs. Current public interest in our facility has been extremely robust and we expect it will vastly increase as the facility expands, promoting tourism. Complex will produce a variety of local, fresh vegetables while maximizing environmentally sustainable, conservation friendly and ecologically enhancing practices.						
SECTION 6 TAXPAYER CERTIFICATION						
I hereby certify that the representations in this statement are true.						
Signature of authorized representative <i>J. Jay Raciorek</i>					Date signed (month, day, year) 11/10/21	
Printed name of authorized representative J. Jay Raciorek					Title Director of Finance	

**FOR USE OF THE DESIGNATING BODY**

We find that the applicant meets the general standards in the resolution adopted or to be adopted by this body. Said resolution, passed or to be passed under IC 6-1.1-12.1, provides for the following limitations:

- 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  Yes  No  
 2. Residentially distressed areas  Yes  No
- C. The amount of the deduction applicable is limited to \$ \_\_\_\_\_.
- D. Other limitations or conditions (*specify*) \_\_\_\_\_
- E. Number of years allowed:  Year 1  Year 2  Year 3  Year 4  Year 5 (\* see below)  
 Year 6  Year 7  Year 8  Year 9  Year 10
- F. For a statement of benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?  
 Yes  No  
 If yes, attach a copy of the abatement schedule to this form.  
 If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

We have also 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 of designating body</i> )	Telephone number (    )	Date signed ( <i>month, day, year</i> )
Printed name of authorized member of designating body	Name of designating body	
Attested by ( <i>signature and title of attester</i> )	Printed name of attester	

\* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

- A. For residentially distressed areas where the Form SB-1/Real Property was approved prior to July 1, 2013, the deductions established in IC 6-1.1-12.1-4.1 remain in effect. The deduction period may not exceed five (5) years. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. The deduction period may not exceed ten (10) years. (See IC 6-1.1-12.1-17 below.)
- B. For the redevelopment or rehabilitation of real property where the Form SB-1/Real Property was approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. (See IC 6-1.1-12.1-17 below.)

**IC 6-1.1-12.1-17**

**Abatement schedules**

Sec. 17. (a) A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
  - (2) The number of new full-time equivalent jobs created.
  - (3) The average wage of the new employees compared to the state minimum wage.
  - (4) The infrastructure requirements for the taxpayer's investment.
- (b) This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. An abatement schedule may not exceed ten (10) years.
- (c) An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.



**STATEMENT OF BENEFITS  
PERSONAL PROPERTY**

State Form 51764 (R4 / 11-15)  
Prescribed by the Department of Local Government Finance

Filed in Clerk's Office  
JAN 04 2022  
DAWN M. JONES  
CITY CLERK, SOUTH BEND, IN

FORM SB-1 / PP

**PRIVACY NOTICE**

Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

**INSTRUCTIONS**

- 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.
- The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the installation of qualifying abatable equipment for which the person desires to claim a deduction.
- To obtain a deduction, a person must file a certified deduction schedule with the person's personal property return on a certified deduction schedule (Form 103-ERA) with the township assessor of the township where the property is situated or with the county assessor if there is no township assessor for the township. The 103-ERA must be filed between January 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 is installed and fully functional, unless a filing extension has been obtained. A person who obtains a filing extension must file the form between January 1 and the extended due date of that year.
- Property owners whose Statement of Benefits was approved, must submit Form CF-1/PP annually to show compliance with the Statement of Benefits. (IC 6-1.1-12.1-5.6)
- For a Form SB-1/PP that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/PP that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. (IC 6-1.1-12.1-17)

SECTION 1 TAXPAYER INFORMATION									
Name of taxpayer Greenleaf Hold Co. dba Pure Green Farms			Name of contact person Joe McGuire, CEO						
Address of taxpayer (number and street, city, state, and ZIP code) 3820 W. Calvert				Telephone number ( 863 ) 370-3154					
SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT									
Name of designating body City of South Bend / St. Joseph County				Resolution number (s)					
Location of property 3820 W. Calvert South Bend, IN 46613			County St. Joseph	DLGF taxing district number 026 South Bend (Portage)					
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.)  Please refer to supplemental sheet				ESTIMATED					
				START DATE		COMPLETION DATE			
				Manufacturing Equipment		1/1/22	12/31/24		
				R & D Equipment		N/A		N/A	
				Logist Dist Equipment		N/A		N/A	
IT Equipment		1/1/22	12/31/24						
SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT									
Current number 25	Salaries 1.65M/Year	Number retained 25	Salaries 1.65M/Year	Number additional 75	Salaries 2.75M/Year				
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	21M	In Progress					80K	In Progress
	Plus estimated values of proposed project	70M	In Progress					30K	In Progress
	Less values of any property being replaced	-----	-----					-----	-----
Net estimated values upon completion of project	91M	In Progress					110K	In Progress	
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER									
Estimated solid waste converted (pounds) <u>Variable and Increasing</u>			Estimated hazardous waste converted (pounds) <u>N/A</u>						
Other benefits: Please refer to supplemental sheet									
SECTION 6 TAXPAYER CERTIFICATION									
I hereby certify that the representations in this statement are true.									
Signature of authorized representative 				Date signed (month, day, year) 1/10/21					
Printed name of authorized representative J. Jay Paciorek			Title Director of Finance						

**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 \_\_\_\_\_. *NOTE: This question addresses whether the resolution contains an expiration date for the designated area.*
- 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 | <input type="checkbox"/> Enhanced Abatement per IC 6-1.1-12.1-18<br>Check box if an enhanced abatement was approved for one or more of these types. |
| 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 \$ \_\_\_\_\_. *(One or both lines may be filled out to establish a limit, if desired.)*
- D. The amount of deduction applicable to new research and development equipment is limited to \$ \_\_\_\_\_ cost with an assessed value of \$ \_\_\_\_\_. *(One or both lines may be filled out to establish a limit, if desired.)*
- E. The amount of deduction applicable to new logistical distribution equipment is limited to \$ \_\_\_\_\_ cost with an assessed value of \$ \_\_\_\_\_. *(One or both lines may be filled out to establish a limit, if desired.)*
- F. The amount of deduction applicable to new information technology equipment is limited to \$ \_\_\_\_\_ cost with an assessed value of \$ \_\_\_\_\_. *(One or both lines may be filled out to establish a limit, if desired.)*
- 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 is allowed for:
- |                                 |                                 |                                 |                                 |                                  |   |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|----------------------------------|---|
| <input type="checkbox"/> Year 1 | <input type="checkbox"/> Year 2 | <input type="checkbox"/> Year 3 | <input type="checkbox"/> Year 4 | <input type="checkbox"/> Year 5  | <input type="checkbox"/> Enhanced Abatement per IC 6-1.1-12.1-18<br>Number of years approved: _____<br><i>(Enter one to twenty (1-20) years; may not exceed twenty (20) years.)</i> |
| <input type="checkbox"/> Year 6 | <input type="checkbox"/> Year 7 | <input type="checkbox"/> Year 8 | <input type="checkbox"/> Year 9 | <input type="checkbox"/> Year 10 |   |
- I. For a Statement of Benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?  Yes  No  
If yes, attach a copy of the abatement schedule to this form.  
If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

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 by: (signature and title of authorized member of designating body)	Telephone number ( )	Date signed (month, day, year)
Printed name of authorized member of designating body	Name of designating body	
Attested by: (signature and title of attester)	Printed name of attester	

\* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

**IC 6-1.1-12.1-17**

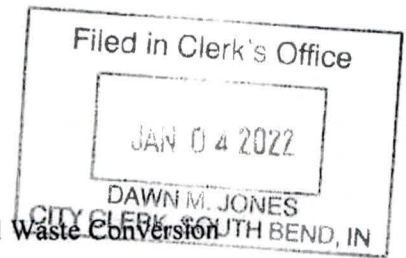
**Abatement schedules**

Sec. 17. (a) A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
- (2) The number of new full-time equivalent jobs created.
- (3) The average wage of the new employees compared to the state minimum wage.
- (4) The infrastructure requirements for the taxpayer's investment.

(b) This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. An abatement schedule may not exceed ten (10) years.

(c) An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.



Pure Green Farms Supplemental Sheet

Form SB-1/PP Section 2: Description of Manufacturing Equipment and Waste Conversion Benefits

Our current location in South Bend is situated strategically and employs advanced technology to promote a safe and sustainable environment in which to grow its leafy greens (additional vegetable/fruit varieties are being researched). With the use of sun and minimal reliance on artificial light, energy efficiency is maximized. The current site rests on a 64-acre purchased parcel that can potentially expand up to 300 acres.

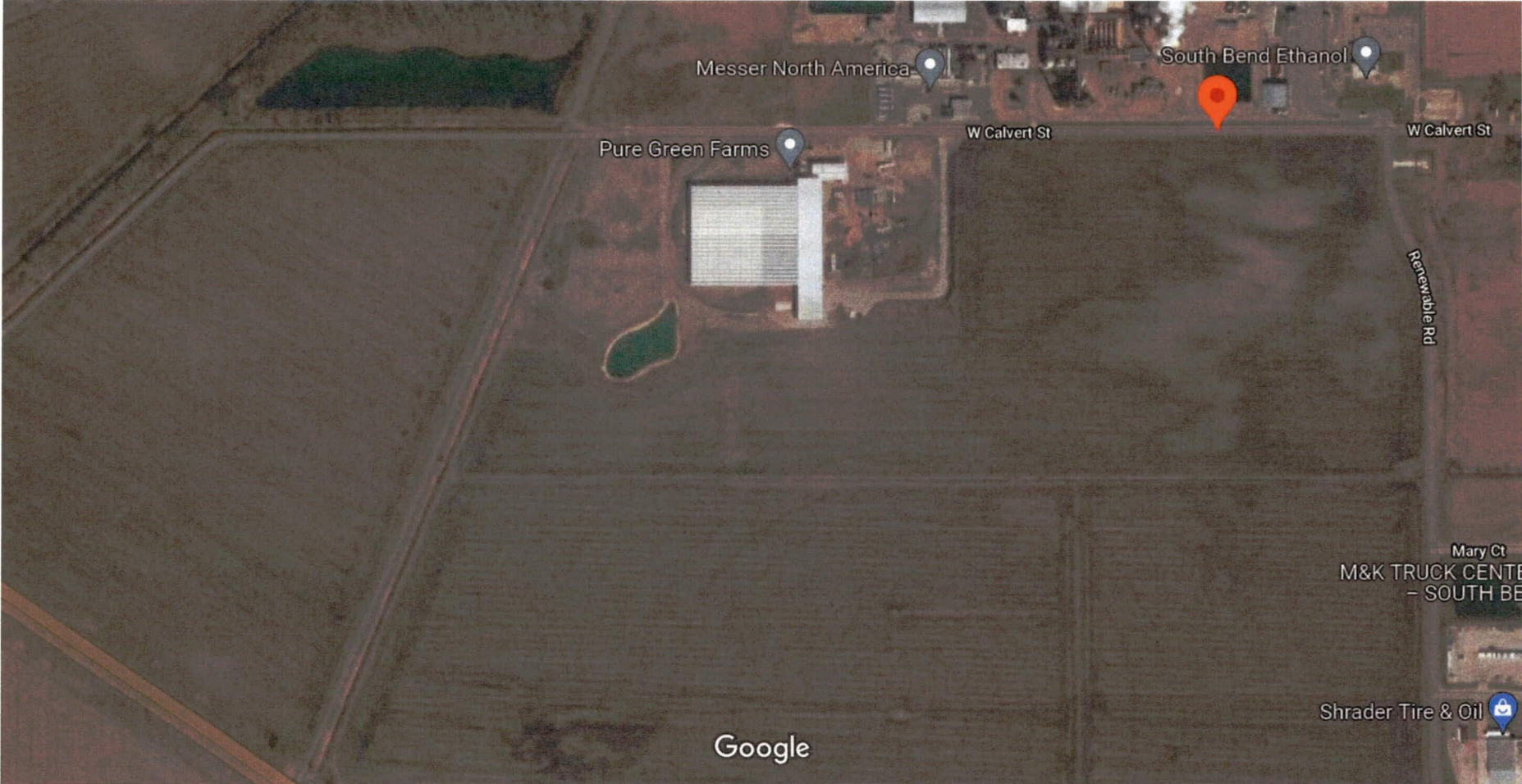
The growing and packing systems are the most advanced in the industry, allowing for very minimal human hands touching the product. Robotics, sensors and video technology are installed throughout the greenhouse and the harvesting area. This streamlines our farm to table process and gives our customers peace of mind that they are getting their greens safely and sooner for a better-quality experience.

The current (and all future additional) greenhouses deploy advanced automated growing systems that control and regulate all processing, growing, harvesting and production evolutions in the produce cycle. The greenhouse uses innovative climate management technologies to monitor and control the heating, the lighting, the air movement, general atmosphere, and concentration of CO<sub>2</sub>.

Multiple screens in the greenhouse growing enclosures help manage light and temperature. The operations are also economically sustainable, utilizing recycling and using an estimated 90% less water compared to field grown lettuce or operating in a fully pest free environment.

As the greens grow, automated gutters move and adjust to allow for increased spacing between plants. This helps the company achieve space efficiency throughout the facility. Labor efficiency is also significantly improved through Pure Green's automatic seeding, harvesting, and packing technology.

Food safety is also top of mind at Pure Green. The indoor farm environment is pesticide-free and uses less water, meaning Pure Green's products are fresh, crisp, and offer the buy-side a long shelf life. Unique, high-quality varieties distributed to a select region maximize natural resources and minimize shrink and overall waste.





9 YEAR

19-Jan-22

**Greenleaf Holdco**

South Bend Portage Township  
Real Property Tax Abatement Schedule\*

Tax Key Number  
Current Assessed Value: Multiple  
Estimated Project Cost: 0  
12,000,000

		Current AV & Tax	Without Abatement	100% Year 1	100% Year 2	100% Year 3	100% Year 4	100% Year 5	90% Year 6	80% Year 7	70% Year 8	60% Year 9
<b>Assessed Value:</b>												
Current Assessed Value	100%	0	0	0	0	0	0	0	0	0	0	0
Base Assessed Value	80%		9,600,000	9,600,000	9,600,000	9,600,000	9,600,000	9,600,000	9,600,000	9,600,000	9,600,000	9,600,000
Less Abatement Deduction			0	(9,600,000)	(9,600,000)	(9,600,000)	(9,600,000)	(9,600,000)	(8,640,000)	(7,680,000)	(6,720,000)	(5,760,000)
Net Assessed Value		0	9,600,000	0	0	0	0	0	960,000	1,920,000	2,880,000	3,840,000
<b>Property Taxes:</b>												
Assume constant tax rate of		5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%	5.3909%
Gross Tax (tax rate x net assessed value)		0	517,522	0	0	0	0	0	51,752	103,504	155,257	207,009
Less Circuit Breaker Credit		0	(229,522)	0	0	0	0	0	0	0	0	0
Net Tax		0	288,000	0	0	0	0	0	51,752	103,504	155,257	207,009
<b>Circuit Breaker Cap</b>												
Circuit Breaker	3.0000%	0	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000
Debt Service	0.0000%	0	0	0	0	0	0	0	0	0	0	0
Circuit Braker Cap		0	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000	288,000

Year	Existing Taxes	New Project Taxes	Combined Existing & New Taxes	Tax Abated	Net Tax Paid
1	0	288,000	288,000	288,000	0
2	0	288,000	288,000	288,000	0
3	0	288,000	288,000	288,000	0
4	0	288,000	288,000	288,000	0
5	0	288,000	288,000	288,000	0
6	0	288,000	288,000	236,248	51,752
7	0	288,000	288,000	184,496	103,504
8	0	288,000	288,000	132,743	155,257
9	0	288,000	288,000	80,991	207,009
Totals	0	2,592,000	2,592,000	2,074,478	517,522

\*This schedule is for estimation purposes only and assumes constant tax rates. The true tax values will ultimately be determined by the actual assessed valuation and the then current tax rates.

## Greenleaf Holdco

### South Bend Portage Township Personal Property Tax Abatement Schedule\*

Tax Key Number TBD  
 Current Assessed Value: 0  
 Estimated Project Cost: 68,000,000

		100%	100%	100%	100%	100%
		Year 1	Year 2	Year 3	Year 4	Year 5
		<u>Assessed Value:</u>				
Current Assessed Value	100%	0	0	0	0	0
Base Assessed Value		27,200,000	40,800,000	37,400,000	30,600,000	25,160,000
Less Abatement Deduction		(27,200,000)	(40,800,000)	(37,400,000)	(30,600,000)	(25,160,000)
Net Assessed Value		0	0	0	0	0
		<u>Property Taxes:</u>				
Assume constant tax rate of		5.3909%	5.3909%	5.3909%	5.3909%	5.3909%
Gross Tax (tax rate x net assessed value)		0	0	0	0	0
Less Circuit Breaker Credit		0	0	0	0	0
Net Tax		0	0	0	0	0
		<u>Circuit Breaker Cap</u>				
Circuit Breaker	3.0000%	0	816,000	1,224,000	1,122,000	918,000
Debt Service	0.0000%	0	0	0	0	0
Circuit Braker Cap		0	816,000	1,224,000	1,122,000	918,000

Year	Existing Taxes	New Project Taxes	Combined Existing & New Taxes	Tax Abated	Net Tax Paid
Year 1	0	816,000	816,000	816,000	0
Year 2	0	1,224,000	1,224,000	1,224,000	0
Year 3	0	1,122,000	1,122,000	1,122,000	0
Year 4	0	918,000	918,000	918,000	0
Year 5	0	754,800	754,800	754,800	0
Totals	0	4,834,800	4,834,800	4,834,800	0

\*This schedule is for estimation purposes only and assumes constant tax rates. The true tax values will ultimately be determined by the actual assessed valuation and the then current tax rates.

# 01-25



## City of South Bend **PLAN COMMISSION**

County-City Building  
227 W. Jefferson Blvd. 1400S  
South Bend, IN 46601  
(574) 235-7627  
[www.southbendin.gov/zoning](http://www.southbendin.gov/zoning)

December 20, 2024

Honorable Committee Chair Davis  
4<sup>th</sup> Floor, County-City Building  
South Bend, IN 46601

RE: 1408 Elwood Avenue – PC#0241-25

Dear Committee Chair Davis:

Enclosed is an Ordinance for the proposed Zone Map Amendment at the above referenced location. Please include the attached Ordinance on the Council agenda for first reading at your January 13, 2025, Council meeting, and set it for public hearing at your January 27, 2025, Council meeting. The petition is tentatively scheduled for public hearing at the January 21, 2025, South Bend Plan Commission meeting. The recommendation of the South Bend Plan Commission will be forwarded to the Office of the City Clerk by noon on the day following the public hearing.

The petitioner provided the following to describe the proposed project:

*Rezone property from I Industrial to U3 Urban Neighborhood 3*

If you have any questions, please feel free to contact our office.

Sincerely,

Kari Myers  
Zoning Specialist

CC: Bob Palmer

**Filed in Clerk's Office**

**DEC 30 2024**

**Bianca Tirado  
City Clerk, South Bend, IN**

DEC 30 2024

Bianca Tirado  
City Clerk, South Bend, IN

**BILL NO. 01-25**

**ORDINANCE NO. \_\_\_\_\_**

**AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND,  
INDIANA, AMENDING THE ZONING ORDINANCE FOR PROPERTY LOCATED AT  
1408 ELWOOD AVENUE, COUNCILMANIC DISTRICT NO. 2 IN THE CITY OF  
SOUTH BEND, INDIANA**

---

**STATEMENT OF PURPOSE AND INTENT**

*Rezone property from I Industrial to U3 Urban Neighborhood 3*

---

**NOW, THEREFORE, BE IT ORDAINED** by the Common Council of the City of South Bend, Indiana, as follows:

**SECTION I.** Ordinance No. 10689-19, which ordinance is commonly known as the Zoning Ordinance of the City of South Bend, Indiana, be and the same hereby amended in order that the zoning classification of the following described real estate in the City of South Bend, St. Joseph County, State of Indiana:

PARCEL 1: A part of the Northwest Quarter of Section 2, Township 37 North, Range 2 East, which part is bounded by a line running as follows: Beginning on the South line of Elwood Avenue in the City of South Bend at a point 372 feet East of the West line of said Section 2; thence South 1138 feet; thence East 408 feet; thence South 332.9 feet to the Northwesterly right of way line of the Chicago, South Bend and Southern Railroad; thence Northeasterly along the said Northwesterly right of way line a distance of 338.54 feet; thence North 1054 feet; thence West 73 feet; thence North 130 feet to the said South line of Elwood Avenue; thence West along the South line of Elwood Avenue, a distance of 530 feet to the place of beginning, EXCEPTING THEREFROM the following parcel conveyed to Indiana & Michigan Electric Company by a deed dated November 2, 1948 recorded in Deed Record 446, pages 02-03: Beginning on the South line of Elwood Avenue in the City of South Bend at a point 20 feet South and 372 feet East of the Northwest corner of said Section 2; thence East 73 feet; thence South 70 feet; thence West 73 feet; thence North 70 feet to the place of beginning.

AND FURTHER EXCEPTING THEREFROM a tract of land in the Northwest Quarter of Section 2, Township 37 North, Range 2 East, City of South Bend, St. Joseph County, Indiana, described as beginning at a point 975.4 feet East and 744.88 feet South of the Northwest corner of said Section 2, said point being 459.12 feet North of the Northwesterly right of way line of the

Chicago, South Bend and Southern Railroad; thence South 00°00'00" West 459.12 feet to the Northwesterly line of said railroad; thence South 34°17'56" West along said Northwesterly line, 235.58 feet; thence North 00°09'33" East, 653.75 feet; thence South 89°59'42" East, 130.94 feet to the place of beginning.

PARCEL II: Part of the Northwest Quarter of the Northwest Quarter of Section 2, Township 37 North, Range 2 East, described as beginning at a point 902 feet East and 20 feet South of the Northwest corner of said Section; running thence South 130 feet; thence East 73 feet; thence North 130 feet to a point 73.4 feet East of the place of beginning; thence West 73.4 feet to the place of beginning.

Commonly known as 1408 Elwood Avenue. 018-1094-3943

be and the same is hereby established as U3 Urban Neighborhood 3 District

**SECTION II.** This ordinance is and shall be subject to commitments as provided by Chapter 21-12.07(f)(7) Commitments, if applicable.

**SECTION III.** This Ordinance shall be in full force and effect from and after its passage by the Common Council and approval by the mayor, and legal publication, and full execution of any conditions or Commitments placed upon the approval.

\_\_\_\_\_  
Council President  
South Bend Common Council

Attest:

\_\_\_\_\_  
Bianca Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_\_ o'clock \_\_\_\_ . m.

\_\_\_\_\_  
Bianca Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_ o'clock \_\_\_\_ .m.

\_\_\_\_\_  
James Mueller, Mayor  
City of South Bend, Indiana

**Petition for Rezoning or Combined Public Hearing**

**Property Information**

Tax Key Number 018-1094-3943 / 71-08-02-101-006.000-026

Address: 1408 Elwood Ave

Owner: Civil City of South Bend

Legal Description:

SEE ATTACHED

Filed in Clerk's Office

DEC 30 2024

Bianca Tirado  
City Clerk, South Bend, IN

**Project Summary**

SEE ATTACHED

**Requested Action**

Application includes (check all that apply)

Rezoning

Current District: I Industrial

Additional Districts, if applicable

Proposed District U3 Urban Neighborhood 3

Additional Districts, if applicable

*The Plan Commission and Council will consider the following in the review of a rezoning petition:*

- (1) *The comprehensive Plan;*
- (2) *Current conditions and the character of the current structures and uses in each district;*
- (3) *The most desirable use for which the land in each district is adapted;*
- (4) *The conservation of property values throughout the jurisdiction; and*
- (5) *Responsible development and growth.*

Subdivision – *complete and attach subdivision application*

Special Exception – *complete and attach Criteria for Decision Making*

Use requested: \_\_\_\_\_

Variance(s) - *List variances below, complete and attach Criteria for Decision Making*

Variance(s) requested: \_\_\_\_\_

**Required Documents**

- Completed Application (including Contact Information)
- Site Plan drawn to scale
- Filing Fee
- Additional documents as noted above

**Contact information**

**Property owner(s) of the petition site:**

Name: Civil City of South Bend

Address: 227 W. Jefferson South Bend IN 46601

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

**Contact Person:**

Name: Joseph Molnar

Address: 227 W. Jeffersoun South Bend IN 46601

Phone Number: 574-245-6022

E-mail: jrmolnar@southbendin.gov

**By signing this petition, the Petitioner/Property Owners of the above described Real Estate acknowledge they are responsible for understanding and complying with the South Bend Zoning Ordinance and any other ordinance governing the property. Failure of staff to notify the petitioner of a requirement does not imply approval or waiver from anything contained within the ordinance.**

**The undersigned authorizes the contact person listed above to represent this petition before the South Bend Plan Commission and Common Council and to answer any and all questions related to this petition.**

Property Owner (s) Signatures:

  
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**1408 ELWOOD AVENUE  
LEGAL DESCRIPTION**

PARCEL I: A part of the Northwest Quarter of Section 2, Township 37 North, Range 2 East, which part is bounded by a line running as follows: Beginning on the South line of Elwood Avenue in the City of South Bend at a point 372 feet East of the West line of said Section 2; thence South 1138 feet; thence East 408 feet; thence South 332.9 feet to the Northwesterly right of way line of the Chicago, South Bend and Southern Railroad; thence Northeasterly along the said Northwesterly right of way line a distance of 338.54 feet; thence North 1054 feet; thence West 73 feet; thence North 130 feet to the said South line of Elwood Avenue; thence West along the South line of Elwood Avenue, a distance of 530 feet to the place of beginning, EXCEPTING THEREFROM the following parcel conveyed to Indiana & Michigan Electric Company by a deed dated November 2, 1948 recorded in Deed Record 446, pages 02-03: Beginning on the South line of Elwood Avenue in the City of South Bend at a point 20 feet South and 372 feet East of the Northwest corner of said Section 2; thence East 73 feet; thence South 70 feet; thence West 73 feet; thence North 70 feet to the place of beginning.

AND FURTHER EXCEPTING THEREFROM a tract of land in the Northwest Quarter of Section 2, Township 37 North, Range 2 East, City of South Bend, St. Joseph County, Indiana, described as beginning at a point 975.4 feet East and 744.88 feet South of the Northwest corner of said Section 2, said point being 459.12 feet North of the Northwesterly right of way line of the Chicago, South Bend and Southern Railroad; thence South 00°00'00" West 459.12 feet to the Northwesterly line of said railroad; thence South 34°17'56" West along said Northwesterly line, 235.58 feet; thence North 00°09'33" East, 653.75 feet; thence South 89°59'42" East, 130.94 feet to the place of beginning.

PARCEL II: Part of the Northwest Quarter of the Northwest Quarter of Section 2, Township 37 North, Range 2 East, described as beginning at a point 902 feet East and 20 feet South of the Northwest corner of said Section; running thence South 130 feet; thence East 73 feet; thence North 130 feet to a point 73.4 feet East of the place of beginning; thence West 73.4 feet to the place of beginning.

Commonly known as 1408 Elwood Avenue. 018-1094-3943





**CITY OF SOUTH BEND**  
DEPARTMENT OF COMMUNITY INVESTMENT

The City of South Bend acquired the former "Drewrys Brewery" in the summer of 2022. Since then, the City in partnerships with the EPA and IDEM have been performing extensive environmental testing, environmental remediation, and cleanup of the property. Currently the City is finishing up its second phase of cleanup including removing the remaining existing former industrial buildings. A final phase of cleanup will occur in mid-2025 with the removal of all remaining foundations. At that point, the site will be largely ready for redevelopment.

The property is currently zoned I Industrial. City staff believe the property is no longer suited for industrial use and its location adjacent to a park and within a neighborhood better suits the property for a mix of residential and small scale retail.

Attached as a site plan is a proposed concept of what a redevelopment could be like and is not a final design but only for deliberative purposes.

Sincerely,

Joseph Molnar  
Assistant Director of Growth & Opportunity  
City of South Bend



# 02-25



## City of South Bend PLAN COMMISSION

County-City Building  
227 W. Jefferson Blvd. 1400S  
South Bend, IN 46601  
(574) 235-7627  
[www.southbendin.gov/zoning](http://www.southbendin.gov/zoning)

December 19, 2024

Honorable Committee Chair Davis  
4<sup>th</sup> Floor, County-City Building  
South Bend, IN 46601

RE: 616 Sherman Avenue – PC#0239-25

Filed in Clerk's Office

DEC 30 2024

Bianca Tirado  
City Clerk, South Bend, IN

Dear Committee Chair Davis:

Enclosed is an Ordinance for the proposed Zone Map Amendment at the above referenced location. Please include the attached Ordinance on the Council agenda for first reading at your January 13, 2025, Council meeting, and set it for public hearing at your January 27, 2025, Council meeting. The petition is tentatively scheduled for public hearing at the January 21, 2025, South Bend Plan Commission meeting. The recommendation of the South Bend Plan Commission will be forwarded to the Office of the City Clerk by noon on the day following the public hearing.

The petitioner provided the following to describe the proposed project:

*Rezone the property from U3 Urban Neighborhood 3 to U2 Urban Neighborhood 2.*

If you have any questions, please feel free to contact our office.

Sincerely,

Kari Myers  
Zoning Specialist

CC: Bob Palmer

DEC 30 2024

Bianca Tirado  
City Clerk, South Bend, IN

**BILL NO. 02-25**

**ORDINANCE NO. \_\_\_\_\_**

**AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA, AMENDING THE ZONING ORDINANCE FOR PROPERTY LOCATED AT 616 SHERMAN AVENUE, COUNCILMANIC DISTRICT NO. 1 IN THE CITY OF SOUTH BEND, INDIANA**

---

**STATEMENT OF PURPOSE AND INTENT**

Rezone the property from U3 Urban Neighborhood 3 to U2 Urban Neighborhood 2

---

**NOW, THEREFORE, BE IT ORDAINED** by the Common Council of the City of South Bend, Indiana, as follows:

**SECTION I.** Ordinance No. 10689-19, which ordinance is commonly known as the Zoning Ordinance of the City of South Bend, Indiana, be and the same hereby amended in order that the zoning classification of the following described real estate in the City of South Bend, St. Joseph County, State of Indiana:

Lot 4 Cushings 1<sup>st</sup> Addition

be and the same is hereby established as U2 Urban Neighborhood 2

**SECTION II.** This ordinance is and shall be subject to commitments as provided by Chapter 21-12.07(f)(7) Commitments, if applicable.

**SECTION III.** This Ordinance shall be in full force and effect from and after its passage by the Common Council and approval by the mayor, and legal publication, and full execution of any conditions or Commitments placed upon the approval.

---

Council President  
South Bend Common Council

Attest:

---

Bianca Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_\_ o'clock \_\_\_\_ . m.

---

Bianca Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_ o'clock \_\_\_\_ .m.

---

James Mueller, Mayor  
City of South Bend, Indiana

**Petition for Rezoning or Combined Public Hearing**

**Property Information**

Tax Key Number 018-1074-3129

Address: 616 Sherman Drive

Owner: Property Brothers, LLC.

Legal Description:

Lot 4 Cushings 1st

Filed in Clerk's Office

DEC 30 2024

Bianca Tirado  
City Clerk, South Bend, IN

**Project Summary**

Rezoning from U-3 to U-2 for consistency of replating of lot lines so the current zoning district does not split a lot line.

**Requested Action**

Application includes (check all that apply)

Rezoning

Current District: U3 Urban Neighborhood 3

Additional Districts, if applicable

Proposed District U2 Urban Neighborhood 2

Additional Districts, if applicable

*The Plan Commission and Council will consider the following in the review of a rezoning petition:*

(1) *The comprehensive Plan;*

(2) *Current conditions and the character of the current structures and uses in each district;*

(3) *The most desirable use for which the land in each district is adapted;*

(4) *The conservation of property values throughout the jurisdiction; and*

(5) *Responsible development and growth.*

Subdivision – *complete and attach subdivision application*

Special Exception – *complete and attach Criteria for Decision Making*

Use requested: \_\_\_\_\_

Variance(s) - *List variances below, complete and attach Criteria for Decision Making*

Variance(s) requested: \_\_\_\_\_

**Required Documents**

Completed Application (including Contact Information)

Site Plan drawn to scale

Filing Fee

Additional documents as noted above

**Contact information**

**Property owner(s) of the petition site:**

Name: Property Brothers, LLC.

Address: 1251 N. Eddy Street  
South Bend, In 46617

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

**Contact Person:**

Name: Abonmarche Consultants

Address: 315 W. Jefferson Blvd.  
South Bend, In 46601


Phone Number: 574-232-8700

E-mail: mrozycki@abonmarche.com

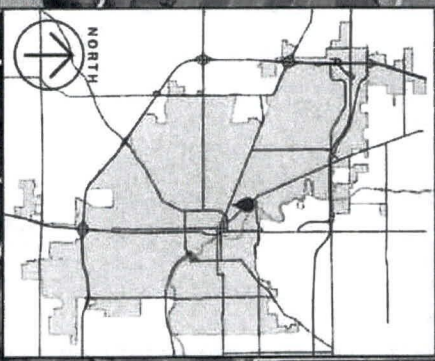
**By signing this petition, the Petitioner/Property Owners of the above described Real Estate acknowledge they are responsible for understanding and complying with the South Bend Zoning Ordinance and any other ordinance governing the property. Failure of staff to notify the petitioner of a requirement does not imply approval or waiver from anything contained within the ordinance.**

**The undersigned authorizes the contact person listed above to represent this petition before the South Bend Plan Commission and Common Council and to answer any and all questions related to this petition.**

Property Owner (s) Signatures:

  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

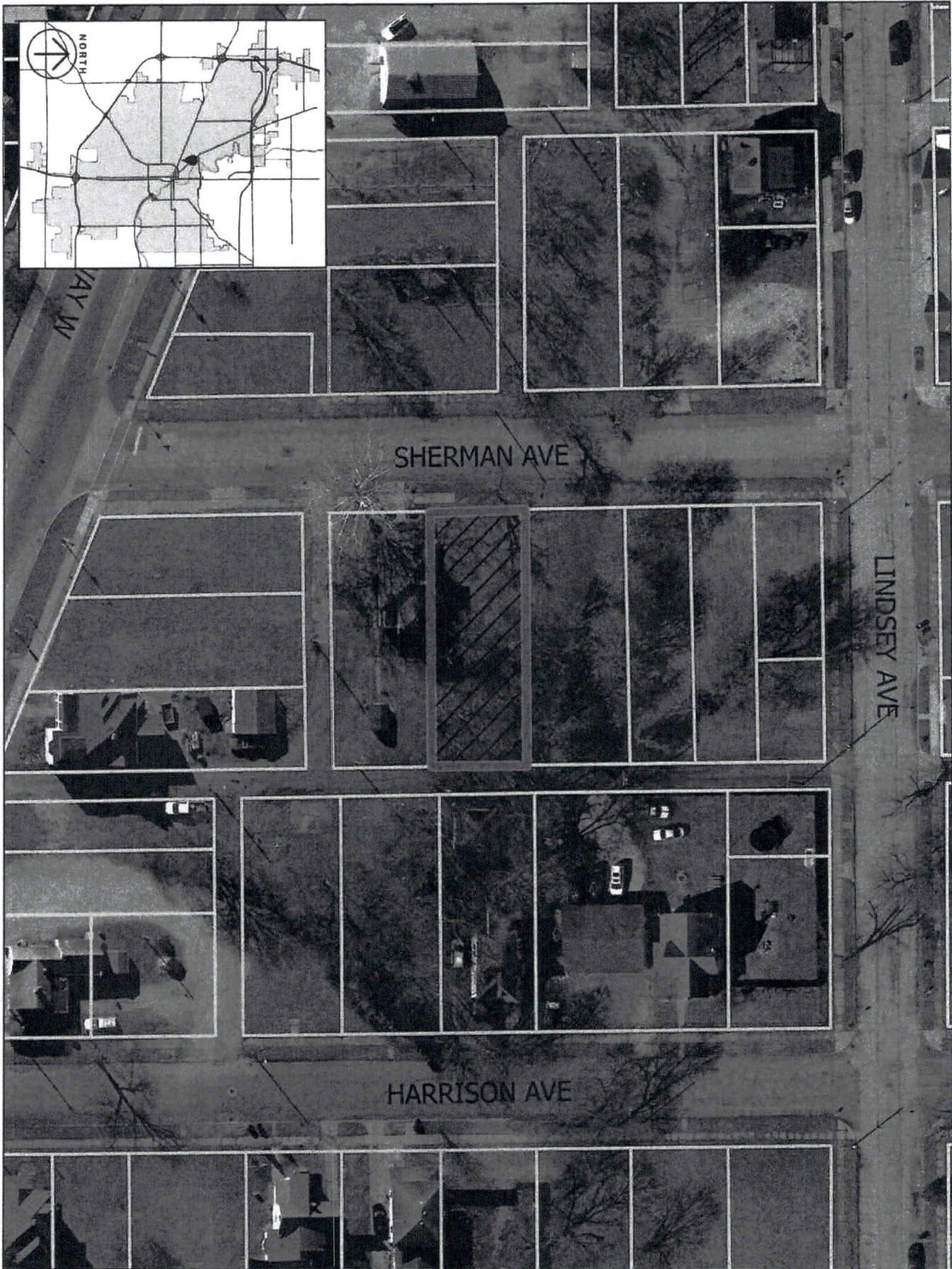


LAY W

SHERMAN AVE

LINSEY AVE

HARRISON AVE





# 03-25



## City of South Bend **PLAN COMMISSION**

County-City Building  
227 W. Jefferson Blvd. 1400S  
South Bend, IN 46601  
(574) 235-7627  
[www.southbendin.gov/zoning](http://www.southbendin.gov/zoning)

December 20, 2024

Honorable Committee Chair Davis  
4<sup>th</sup> Floor, County-City Building  
South Bend, IN 46601

RE: 4022 Old Cleveland Road – PC#0240-25  
Rezoning and Use Variance

**Filed in Clerk's Office**

JAN 02 2025

Bianca Tirado  
City Clerk, South Bend, IN

Dear Committee Chair Davis:

Enclosed is an Ordinance for the proposed Zone Map Amendment and Use Variance at the above referenced location. Please include the attached Ordinance on the Council agenda for first reading at your January 13, 2025, Council meeting, and set it for public hearing at your January 27, 2025, Council meeting. The petition is tentatively scheduled for public hearing at the January 21, 2025, South Bend Plan Commission meeting. The recommendation of the South Bend Plan Commission will be forwarded to the Office of the City Clerk by noon on the day following the public hearing.

The petitioner provided the following to describe the proposed project:

*Rezone the property from I Industrial District to S2 Suburban Neighborhood District and a Use Variance for a Group Residence*

If you have any questions, please feel free to contact our office.

Sincerely,

Kari Myers  
Zoning Specialist

CC: Bob Palmer

---

**Tim Corcoran**  
Planning Director

**Tim Corcoran**  
Interim Zoning Administrator

**Scott Ford**  
Commission President

JAN 02 2025

Bianca Tirado  
City Clerk, South Bend, IN

**BILL NO. 03-25**

**ORDINANCE NO. \_\_\_\_\_**

**AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA, AMENDING THE ZONING ORDINANCE AND SEEKING A USE VARIANCE FOR PROPERTY LOCATED AT 4022 OLD CLEVELAND ROAD, COUNCILMANIC DISTRICT NO. 1 IN THE CITY OF SOUTH BEND, INDIANA**

---

**STATEMENT OF PURPOSE AND INTENT**

*Rezone property from I Industrial District to S2 Suburban Neighborhood 2 District*

---

Petitioners desire to rezone the property from I Industrial District to S2 Suburban Neighborhood 2 District and seek a Use Variance for a Group Residence Use.

**NOW, THEREFORE, BE IT ORDAINED** by the Common Council of the City of South Bend, Indiana, as follows:

**SECTION I.** Ordinance No. 10689-19, which ordinance is commonly known as the Zoning Ordinance of the City of South Bend, Indiana, be and the same hereby amended in order that the zoning classification of the following described real estate in the City of South Bend, St. Joseph County, State of Indiana:

Part of the East Half of the Northwest Quarter of Section 28, Township 38 North, Range 2 East, described as follows: Beginning at a point 10 rods West of the Northeast corner of the Northwest Quarter of said Section 28; running thence West along the North line of the Northwest Quarter of said Section 28, a distance of 30 rods; thence South 106 2/3 rods; thence East 30 rods; thence North 106 2/3 rods to the place of beginning.

EXCEPTING THEREFROM: A parcel of land being a part of the East Half of the Northwest Quarter of Section 28, Township 38 North, Range 2 East, German Township, St. Joseph County, Indiana, and being more particularly described as follows, viz: Commencing at the Northeast corner of the Northwest Quarter of said Section 28; thence South 89°53'05" West along the North line of said Section 28, a distance of 165.00 feet; thence South 00°02'57" West, 1335.29 feet to the point of beginning for this description; thence continuing South 00°02'57" West, 445.00 feet to the North line of Airport Industrial Park, Phase III; thence South 89°44'25" West along said North line of Airport Industrial Park, Phase III, 495.97 feet; thence North 00°04'49" East, 445.00 feet; thence North 89°44'25" East, parallel with said North line of Airport Industrial Park, Phase III, 495.73 feet to the place of beginning.

Commonly known as 4022 Old Cleveland Rd. 025-1010-0380

be and the same is hereby established as S2 Suburban Neighborhood 2

**SECTION II.** That a Use Variance for a Group Residence is hereby granted subject to a site development plan hereby attached and made a part of this Ordinance and which site plan contains and lists all conditions, if any, by the Advisory Plan Commission.

**SECTION III.** The Common Council of the City of South Bend, Indiana, hereby finds that:

1. The proposed use will not be injurious to the public health, safety, comfort, community moral standards, convenience or general welfare;
2. The proposed use will not injure or adversely affect the use of adjacent area of property values therein;
3. The proposed use will be consistent with the character of the district in which it is located and the land uses authorized therein;
4. The proposed use is compatible with the recommendations of the City of South Bend Comprehensive Plan;

**SECTION IV.** This ordinance is and shall be subject to commitments as provided by Chapter 21-12.07(f)(7) Commitments, if applicable.

**SECTION V.** This Ordinance shall be in full force and effect from and after its passage by the Common Council and approval by the Mayor, and legal publication, and full execution of any conditions or Commitments placed upon the approval.

---

Council President  
South Bend Common Council

Attest:

---

Bianca Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_\_ o'clock \_\_\_\_ . m.

---

Bianca Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_ o'clock  
\_\_\_\_.m.

---

James Mueller, Mayor  
City of South Bend, Indiana

**Petition for Rezoning or Combined Public Hearing**

**Property Information**

Tax Key Number 025-1010-0380 / 71-03-28-100-004.000-009

Address: 4022 Old Cleveland

Owner: CITY OF SOUTH BEND DEPARTMENT OF REDEVELOPMENT

Legal Description:

14.93 Ac S Side Cleveland Rd Beg 165' W Of Ne Cor Nw Sec 28-38-2e

Filed in Clerk's Office

JAN 02 2025

Bianca Tirado  
City Clerk, South Bend, IN

**Project Summary**

The intended use of the property is as a location for the Low-Barrier Intake Center that was originally proposed at a property located on N. Bendix Drive. This new proposed location is larger in acreage and better-located for the prospective use.

**Requested Action**

Application includes (check all that apply)

Rezoning

Current District: I Industrial

Additional Districts, if applicable

Proposed District S2 Suburban Neighborhood 2

Additional Districts, if applicable

*The Plan Commission and Council will consider the following in the review of a rezoning petition:*

- (1) *The comprehensive Plan;*
- (2) *Current conditions and the character of the current structures and uses in each district;*
- (3) *The most desirable use for which the land in each district is adapted;*
- (4) *The conservation of property values throughout the jurisdiction; and*
- (5) *Responsible development and growth.*

Subdivision – *complete and attach subdivision application*

Special Exception – *complete and attach Criteria for Decision Making*

Use requested: \_\_\_\_\_

Variance(s) - *List variances below, complete and attach Criteria for Decision Making*

Variance(s) requested:

- 1. Use variance for Group Residence
- 2. Variance from a required building type to no building type.

**Required Documents**

- Completed Application (including Contact Information)
- Site Plan drawn to scale
- Filing Fee
- Additional documents as noted above

**Contact information**

**Property owner(s) of the petition site:**

Name: CITY OF SOUTH BEND DEPARTMENT OF REDEVELOPMENT

Address: 227 W. Jefferson Blvd South Bend IN 46601

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

**Contact Person:**

Name: Joseph Molnar

Address: 227 W. Jefferson Blvd. South Bend IN

Phone Number: 574-245-6022

E-mail: jrmolnar@southbendin.gov

**By signing this petition, the Petitioner/Property Owners of the above described Real Estate acknowledge they are responsible for understanding and complying with the South Bend Zoning Ordinance and any other ordinance governing the property. Failure of staff to notify the petitioner of a requirement does not imply approval or waiver from anything contained within the ordinance.**

**The undersigned authorizes the contact person listed above to represent this petition before the South Bend Plan Commission and Common Council and to answer any and all questions related to this petition.**

Property Owner (s) Signatures:

  
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_







# 04-25

County-City Building  
227 W Jefferson Blvd Suite, 1200 N  
South Bend, IN 46601

James Mueller, Mayor



Phone 311 inside City limits  
Email 311@southbendin.gov  
Website Southbendin.gov

Filed in Clerk's Office

JAN 08 2025

Bianca Tirado  
City Clerk, South Bend, IN

## City of South Bend

Department of Administration & Finance  
Division of Human Resources

January 7, 2025

Canneth Lee, President  
City of South Bend Common Council  
227 W. Jefferson Boulevard, 4th Floor  
South Bend, Indiana 46601

RE: 2025 CoSB Investment Policy

Dear President Lee,

This ordinance establishes an investment policy for the City of South Bend for calendar year 2025. This investment policy will be established for up to 4 years unless it is amended by ordinance. This ordinance also provides that the types of investments that need to be renewed more frequently will be renewed by Resolution, as is authorized by Indiana law. That would begin in 2026. This ordinance also allows for the City's investment portfolio to be invested in maturities with more than two years but no more than five years after purchase.

I will present this bill to the Common Council at the appropriate committee and Council meetings. It is requested that this bill be filed for 1st reading on January 13, 2025, with 2nd reading, public hearing and 3rd reading scheduled for January 27, 2025.

Thank you for your attention to this request. If you should have any questions, please feel to contact me at 574-235-9822.

Regards,

A handwritten signature in blue ink that reads "Kyle Willis".

Kyle Willis  
City Controller

JAN 08 2025

Bianca Tirado  
City Clerk, South Bend, IN

**BILL NO. 04-25**

**ORDINANCE NO. \_\_\_\_\_**

**AN ORDINANCE OF THE COMMON COUNCIL OF THE CITY OF SOUTH BEND,  
INDIANA, ADOPTING AN INVESTMENT POLICY FOR THE CITY OF SOUTH BEND  
FOR CALENDAR YEAR 2025 THROUGH 2028**

---

**STATEMENT OF PURPOSE AND INTENT**

---

The Indiana legislature has enacted Indiana Code § 5-13-9 et seq., which permits the fiscal officer of a city to make investments of public funds into designated investment vehicles. The Common Council of the City of South Bend determined that it is in the best interest of the City to authorize the full exercise of the City's investment powers under the Indiana Code.

Accordingly, on December 14, 2020, this Council enacted Ordinance No.10768-20 which established an investment policy for the City of South Bend for calendar year 2021, as provided under Indiana Code § 5-13-9-5.7, and it authorized the City Controller to dedicate up to the maximum allowable proportion of the City's investment portfolio to investments maturing more than two years but not more than five years after purchase. Ordinance No. 10768-20 further authorized the City Controller to invest in certain investment vehicles as provided under Indiana Code § 5-13-9-5 and Indiana Code § 5-13-9-5.3. On December 13, 2021, this Council enacted Ordinance No. 10832-21, which adopted an identical investment policy for the City of South Bend for calendar year 2022. On December 12, 2022, this Council enacted Ordinance No. 10909-22, which adopted an identical investment policy for the City of South Bend for calendar year 2023. On December 11, 2023, this Council enacted Ordinance No. 10993-23, which adopted an identical investment policy for the City of South Bend for calendar year 2024.

This ordinance adopts an identical investment policy for the City of South Bend for calendar year 2025 unless it is earlier amended by ordinance. As provided for in I.C. 5-13-9-5.7, the investment policy may be established by ordinance for a period of up to four (4) years. Authorization under I.C. 5-13-9-5 and I.C. 5-13-9-5.3 may be granted by the Common Council by resolution, so it is the City's intent to adopt future resolutions in 2026 onward to establish those components of the investment policy and establish the investment policy by ordinance for a four-year period as authorized by state law.

**NOW, THEREFORE, BE IT ORDAINED BY THE COMMON COUNCIL OF THE CITY OF SOUTH BEND, INDIANA** as follows:

**SECTION I.** For purposes of Indiana Code § 5-13-9, the investment policy for the City of South Bend first adopted on December 14, 2020 is approved for calendar year 2025, and shall read as follows:

With the approval of the City Controller, as the investing officer for the City of

South Bend, the City may invest public funds in various investment vehicles, in accordance with Title 5, Article 13, of the Indiana Code, as amended from time to time. The City's investment portfolio may contain any investment vehicle generally provided for under Indiana Code § 5-13-9. In addition, the City Controller is granted the following specific authorizations:

1. Pursuant to Indiana Code § 5-13-9-5.7, the City Controller is authorized to make investments having a stated final maturity that is more than two (2) years but not more than five (5) years after the date of purchase or entry into a repurchase agreement, provided that such investments may comprise no more than twenty-five percent (25%) of the total portfolio of public funds invested by the City, including balances in transaction accounts.
2. Pursuant to Indiana Code § 5-13-9-5, the City Controller is authorized to invest in certificates of deposit of certain depositories, as defined by and subject to the requirements of Indiana Code § 5-13-9-5, which authorization will expire on January 27, 2026.
3. Pursuant to Indiana Code § 5-13-9-5.3, the City Controller is authorized to invest in interest bearing deposit accounts that satisfy the conditions stated in Indiana Code § 5-13-9-5.3(b).

**SECTION II.** That portion of the City's investment policy contained in Subparts (1) and (3) of Section I of this ordinance shall be effective from January 1, 2025 through December 31, 2028, unless earlier amended by ordinance. The City's investment policy as contained in Section I, Subpart (2) of this ordinance affecting certificates of deposit shall be effective for a period of one year from its adoption by this Council expiring January 27, 2026, unless earlier amended by ordinance or resolution. This ordinance is further conditioned upon adoption by the Common Council and approval by the Mayor.

---

Canneth Lee, Council President  
South Bend Common Council

Attest:

---

Bianca Tirado, City Clerk  
Office of the City Clerk

Presented by me, the undersigned Clerk of the City of South Bend, to the Mayor of the City of South Bend, Indiana on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_\_\_ o'clock \_\_\_\_ . m.

---

Bianca Tirado, City Clerk  
Office of the City Clerk

Approved and signed by me on the \_\_\_\_\_ day of \_\_\_\_\_, 2025, at \_\_\_ o'clock \_\_\_ m

---

James Mueller, Mayor  
City of South Bend, Indiana