



INDIANA UNIVERSITY

PUBLIC POLICY INSTITUTE

City of Bloomington Redevelopment Commission

Proposal to conduct an economic impact analysis and assistance with compliance reporting the City of Bloomington Certified Technology Park

Introduction

The City of Bloomington Redevelopment Commission (RDC) is seeking assistance in developing a recertification application to the Indiana Economic Development Corporation (IEDC) for its certified technology park (CTP).

If recertification is accomplished successfully, the CTP may be able to generate additional incremental revenues (payroll and sales taxes) in accordance with the recent new state laws governing CTPs. There are several components to the recertification application for which the RDC is seeking assistance. Although the RDC will be responsible for preparing the application, the IU Public Policy Institute (PPI) will assist the RDC in preparing surveys and data from surveys to be included in the application.

The following reporting requirements will be part of the scope of work (SOW) performed by PPI. Below is a recitation of each relevant reporting requirement for this SOW and description of the work to be completed by PPI.

(1) Total employment and payroll levels for all businesses operating within the CTP. For the last three (3) years the park has been in operation please supply the following:

a) The number and names of businesses operating a primary facility within the CTP, with a five-digit NAICS classification for each. Please use the 2022 NAICS classification system, which can be found here <https://www.census.gov/naics/?58967?yearbck=2022>

b) Employment, payroll, and average wage for each active business operating a primary facility within the CTP.

c) Identify the cumulative amount of capital investment made by each business for the last year, and the last three (3) years.

For this section PPI will assist the RDC in constructing the survey questions and will compile the results of the survey for the report. The RDC shall be responsible for administering the survey to businesses located in the CTP, collecting responses, and storing the response data in its own systems.

(2) The use and outcomes of any state money made available to the CTP. For each year since 2019. Please provide detailed information on the following:

[subsections (2) a) – c) omitted]

d) For years since 2019, please provide the total net job change for each year the additional increment has been invested and describe how future deposits will assist in continued high-tech job growth.

For section (2) d) only, PPI will use survey data collected by the RDC to calculate net total job change for each year since 2019, and assist RDC staff with drafting or reviewing the description of how future tax increment deposits will assist in continued high-tech job growth. Because the CTP includes the recently funded and soon-to-be built tech commercialization center, we will be able to draw upon relevant narrative from that successful funding application to describe potential growth in high-tech jobs. We also advise the RDC to discuss future high-tech job growth with the leadership of Dimension Mill to gain additional insight on future job growth. It is assumed that the IEDC would like job change data reported on a state fiscal year basis. If not, the RDC will inform PPI of the fiscal or calendar year it prefers for reporting.

(3) Describe how support secured by the CTP will continue to directly fund CTP company development and growth during the next certification period. High-tech business growth and development. For the last three (3) years list and explain the high-tech growth via intellectual property, products developed within the CTP, or from research and development activities taking place within the CTP and how CTP programmatic activities align with industry best practices.

a) For each business operating within the CTP, provide the number of licenses, patents, trademarks, and copyrights that were:

- a. secured as a result of intellectual property or products developed within the CTP;
- b. secured as a result of the company's research and development activities within the CTP;
- c. DIRECTLY assisted by state supported CTP funding with a listed reference; or

For section (3) a) only, PPI will work with RDC to review survey responses, as well as research patent, trademark, and copyright ownership assigned to businesses in the CTP as listed by the U.S. Patent and Trademark Office.

(5) An analysis of the CTP's overall contribution to the technology-based economy in the community in which the CTP is located. Include a 3rd party conducted economic impact study/report as an addendum to the certification submission. The report shall include the following and is not counted towards the 20-page limit and is pre-approved to submit as an addendum.

- a) The number of high-tech jobs directly supported within the park.
- b) The number of indirect jobs created due to CTP activity.
- c) The amount of annual economic activity directly and indirectly associated with high-tech businesses within the park.

d) A summary report including the above data and other pertinent information regarding impact that shall not exceed 5 pages.

PPI will provide the RDC with the results of the impact study and a summary report to meet all of the requirements of this section. This analysis will be done using IMPLAN software to produce the economic contributions of the CTP to Bloomington's economy. It is assumed that the analysis is for the most recent state fiscal year ended June 30, 2023. Production of this report is contingent upon the timely provision of data collected by the RDC's business survey, and report results will be based on that data provided to PPI by the RDC.

Key PPI staff and roles

The analysis will be performed primarily by **Tom Guevara and Rebecca Nannery, with additional assistance provided, as needed, by other PPI staff and experts.**

Tom Guevara will serve as principal investigator and advisor to the overall project. He also will serve as the client relationship lead with the City RDC and assist in facilitating discussions with key business entities, such as Dimension Mill.

Rebecca Nannery will serve as co-principal for the project. Rebecca is a senior policy analyst who specializes in program evaluation and mixed methods research and applications of these to nonprofit and public settings. Rebecca is a PhD student at the IU Lilly Family School of Philanthropy with an interest in the use of evaluation results by nonprofits, which she works closely with clients to ensure.

Project Timeline

All project deliverables other than assistance with setting up survey instruments and methods for the RDC to administer are contingent upon the timely delivery of survey results and the quality of responses. Incomplete responses for key data, such as jobs and wage data, will have a direct and adverse effect on PPI's ability to deliver report requirements in a timely manner.

All project deliverables, assuming no delays in scheduling interviews or discussions, are estimated to be delivered in time for the RDC to meet its application deadline (currently September 29, 2023) with the IEDC. Upon execution of the agreement with the RDC PPI will work with RDC staff to establish mutually agreeable deadlines for completing each section the above SOW.

Estimated Cost – including PPI data sets, salaries and benefits, economic modeling data sets, University indirect costs and general and administrative costs, \$49,825.

Billing schedule- PPI will submit three invoices for completed work. The first invoice, in the amount of \$19,930 (40%), will be submitted for completion of research, advising, and consultancy for the scope of work described under reporting requirements (1), (2), and (3) above. The second invoice, in the amount of \$24,910 (~50%) will be submitted for completion of the economic impact calculations and summary report under reporting requirement (5), above. The final invoice for \$4,985 will be submitted after final review and acceptance of all PPI deliverables necessary for the RDC to submit its recertification request to the IEDC.

About PPI and Staff

For over 30 years, the IU Public Policy Institute has produced unbiased, high-quality research, analyses and policy guidance to promote positive change and improve the quality of life in communities across Indiana and the nation. A multidisciplinary institute within the O'Neill School of Public and Environmental Affairs, PPI is comprised of several centers of excellence, including, the Center for Urban Policy and the Environment, the Center for Civic Literacy, the Center for Health and Justice Research, the Center for Research on Inclusion and Social Policy, and the Manufacturing Policy Initiative. PPI helps leaders, citizens, and organizations solve problems, seize opportunities, and effect positive change.

Tom Guevara joined the IU Public Policy Institute as its fifth director in April of 2017. Prior to coming to PPI, Tom spent six years as deputy assistant secretary at the U.S. Department of Commerce's Economic Development Administration. Tom has worked in a variety of state and local government positions in Indiana in addition to a six-year career in the private sector with Crowe Horwath LLP in Indianapolis. He served as the assistant budget director for the Health and Human Services division of the Indiana State Budget Agency, served as CIO of the Indiana Family and Social Services Administration, and also worked as controller for the city of Bloomington. He also currently co-chairs the Innovation Policy Forum of the National Academy of Sciences in Washington, D.C. and is a senior advisor to the Renewing American Innovation Project at the Center for Strategic and International Studies in Washington, D.C.

Rebecca Nannery is a senior policy analyst who conducts research on a variety of projects, including those related to economic development in Indiana, local neighborhood resource networks, multi-sectoral collaborations, philanthropy, and other state and local issues. Her professional applied research work spans many different policy topics, including housing stability, the opioid epidemic, older adults, and racial equity. She is experienced with providing capacity-building among government agencies and nonprofit organizations that includes research feedback loops that both interpret key informant and focus group data and define performance indicators that are custom-designed to promote organizational learning and meet organizational and programmatic goals in practice.

Rebecca utilizes both quantitative and qualitative methods to better understand programs and policies and employs her experience and broad understanding of collaborative policy and service provider landscapes to provide her partners with comprehensive recommendations that include a broad array of stakeholder groups from the nonprofit, public, and for-profit sectors, including program participants and community members. Her professional experiences and keen understanding of forces shaping both the nonprofit and public sectors and building relationships with these enable Rebecca to understand concerns at each level of an organization and across complex multi-sectoral collaborative relationships.

Rebecca has a bachelor's degree in biology and a master's degree in urban affairs and public policy, with a focus in nonprofit management. She has completed doctoral coursework in public management and policy analysis and is presently pursuing a Ph.D. in Philanthropic Studies at the Indiana University Lilly Family School of Philanthropy in Indianapolis. Her research interests include program and policy evaluation, specifically the use of program evaluations and performance outcome measures by organizations and their stakeholders.