



Beltz Foundation Downtown Watertown Business Grant Program

Program Overview

The Redevelopment Authority of the City of Watertown (RDA) established its Beltz Foundation Downtown Watertown Business Grant Program to encourage unique businesses to relocate or expand into the Downtown Watertown Redevelopment District Target Area. The program provides grants totaling up to \$50,000.00 per year that can be used towards eligible expenses such as capital improvements, renovations, and signage to their new location in Downtown Watertown.

This is a competitive grant program. Applicants must demonstrate prior, relevant business experience and meet minimum program eligibility requirements. Preference will be given to applicants that add to the diversity of businesses located in Downtown Watertown and fall into categories that align with the program goals.

Applications are reviewed on an as-needed basis by the RDA Grant Program Committee. Deadlines for submission are set at the time the grant applications are opened. Recommendations are presented to the RDA Board of Directors for final approval and awarding of funds.

Please note that applicants must complete the application process before incurring eligible expenses through the Business Grant Program. Any expenses incurred before a Grant Agreement is executed will be ineligible for reimbursement through the grant program.

Available Awards

The RDA has committed a total of \$50,000.00 per year from the Dr. John Beltz Charitable Foundation to the program. Applications will be reviewed and awarded based on quality of application and general merit of the proposed use.

Eligibility Requirements

- Applicant must demonstrate relevant business experience.
- Must be entering a minimum one-year lease or purchasing property within the Target Area.
- Business must be open and accessible to the public for a minimum of 48 hours/week unless an exception is sought.
- Preferences will be given to businesses that fall into the following categories:
 - Entertainment/Family
 - Full Service / Fine Dining, Grab and Go Lunch Stop, Craft Beer
 - Food store, organic foods and gourmet foods
 - Retail establishments offering quality merchandise
 - Non-chain/non-franchised businesses

Eligible Expenses

- Signage and awnings for new location (must be reviewed by the Historical Preservation and Downtown Design Commission)
- Leasehold / capital improvements in new location, including construction costs and fixtures

Please note that if awarded funding, the reimbursement amount will be based on receipts submitted.

Program Goals and Priority Criteria

Property Considerations

- Will the project positively contribute to the City's redevelopment efforts?
- Will the project ameliorate a blighting influence?
- Will the project substantially leverage more investments than the grant funds?
- Will the grant result in an improvement that would not be made otherwise?
- Is the project in an historically designated building?

Business Considerations

- Is the business in a preferred program category?
- Does the business add to the unique mix in Downtown Watertown?
- Can the applicant demonstrate success in prior business activities?
- Can the applicant demonstrate community involvement through prior businesses?

Application Process

Application Contents

An application for the program must include all of the following:

- Beltz Foundation Downtown Watertown Business Grant Application Form
- Project Expenses Worksheet
- A copy of a lease agreement or proof of purchase of property
- Two years of Income Statement projections
- If applicant is existing business: Last three years of business income statements and most recent balance sheet
- If applicant is new business with prior business experience: Last three years of business income statements and most recent balance sheet of prior business
- Renderings, mock-ups, or architectural plans for the new location,
- Business plan.

Submission of Application

The application and all required materials must be submitted to the RDA Executive Director in either print or digital form. Applications are reviewed on a quarterly basis. Applicants are encouraged to submit materials as soon as completed.

Review process

Time of Review

Applications are reviewed after each announced application deadline by the RDA Grant Program Committee.

Substantive Criteria

The RDA Grant Program Committee will screen each application based on the following criteria before making a recommendation regarding the application to the RDA Board of Directors:

- Completeness of application,
- Type of business (preference will be given to businesses that add to the diversity of businesses downtown and align with the RDA's strategic priorities)
- Business history and experience
- Viability of expansion into Downtown Watertown
- Proposed location in Downtown Watertown (visibility and plans for improvement)
- Economic viability of business' expansion or relocation based on financial information submitted and reviewed by the committee

Notification of Recommendation

The applicant will be notified of the RDA Grant Program Committee's recommendation regarding the requested grant to the RDA Board of Directors. The applicant will also be notified of the date, time and location of the RDA Board of Directors meeting at which the committee's recommendation regarding the application will be discussed. The applicant will be invited to attend the meeting and address the Board of Directors regarding their application. The committee may postpone a recommendation on an application if additional information is requested or the application is incomplete.

Board of Directors Approval

After the RDA Grant Program Committee makes a recommendation regarding the application, the recommendation will be placed on the next RDA Board of Directors meeting agenda. The applicant will be invited to attend the meeting and address the Board of Directors regarding their application. The RDA Board meets regularly on the third Wednesday of the month. The applicant will be notified of the RDA Board of Directors decision regarding their application.

Conflict of Interest

Members of the RDA Board of Directors or any of its committees who are in a position to influence decisions regarding grants awarded under this program shall not have a financial interest, either directly or indirectly, in any person or entity applying for a grant through this program, unless that interest has been fully disclosed in writing and the board member/committee member involved has removed him/herself from the decision-making process, including all deliberations.

Denial of Applications

Following the recommendation of the denial of an application by the RDA Grant Program Committee, the RDA Executive Director shall so notify the applicant, stating reasons for the recommendation as communicated by members of the committee, and including, if applicable:

- Requests for additional documents or other information which, if submitted by the applicant, may result in a grant award based on a future application; or,
- Suggestions as to changes in the proposed application which may result in a grant award based on a future application.

Post Award Process

Grant Agreement

Upon approval of the grant award by the RDA Board of Directors, the applicant will be notified and will be sent a Grant Agreement that will need to be signed by the applicant before project expenses can be incurred. Any expenses incurred before the Grant Agreement is executed will be ineligible for reimbursement through the grant program.

Post-award amendments to Project

Following the award of an RDA Business Grant, if the applicant desires to make any changes or modifications from what was approved in their application, the applicant must submit to the RDA Grant Program Committee for review:

- Written description of the changes proposed
- Any updated renderings, mock-ups, or architectural plans for the new location.

NOTE: Failure to obtain approval for any changes in relocation activities after awarding of the original grant will result in disqualification of the applicant from the program and the loss of the entire grant funding.

Distribution of Grant Funds

Payment Request

The applicant may request payment of funds in one payment upon completion of relocation/expansion or request up to three reimbursement payments as relocation/expansion is occurring. To request payment of funds the applicant must submit the following to the RDA Executive Director:

- Affidavit that all work completed and expenses incurred match what was included in the submitted application
- All receipts from eligible expenses seeking to be reimbursed

Compliance with Approved Application

If all submitted documentation is in compliance with applicant's approved application and the program parameters, the RDA Executive Director will issue a reimbursement check. Checks will be issued within 15 days of request.

Non-compliance

If any of the relocation activities are found to be in non-compliance with the approved application or the program requirements, the applicant will be ineligible to receive grant funding or liable to pay back grant funding already received.

Redevelopment Authority of the City of Watertown

Beltz Foundation Downtown Watertown Business Grant Application

Applicant Information

Application Date: 9/17/23

Business Name: Pine Hill Farm Wellness LLC

Type of Business/Industry: Health and Wellness, Retail , Organic grown to-go food options, Spa

Contact Name: Jackie Phillips

Role at Business: Owner

Contact Phone: 414-737-4100 Contact Email: info@thepinehillfarm.com

Business Mailing Address: 200 W. Main Street, Watertown, WI 53094

Total Amount Requested: \$20,000 Total Project Cost: \$25,000

Brief Description of what funds will be used for (please see Program Guidelines for eligible expenses):

The purpose of our project is to support the need for casual outdoor seating along Main Street and to enhance our customer's experience when visiting Pine Hill Farm. We currently have an underutilized open space over an old retaining wall, no longer functional or necessary. We intend to repair the retaining wall, fill, and convert the space into an outdoor, gated patio with seating. This will be open to our store and spa customers along with the public during open business hours (the gate locks) as another option for individuals to sit and relax in the heart of the city, enjoy the sounds, the people watching, and the events across the street at the Square. One could grab a book at the library, a boba tea or a latte from an area business, then enjoy our outdoor patio with views of the Square and sit below our new mural featuring the First Kindergarten and Octagon House.

In an effort to enhance the "stay and play" downtown Watertown experience, we believe this patio with seating directly below our new mural will offer a destination location. Many of our customers are out-of-towners who were previous online customers. They are choosing to drive to Watertown to visit in-person and we want to offer a full experience when they make the drive from sometimes over an hour away. We hope that our continuous investment into our downtown business will be noticed and draw the interest of other business owners who might hope to do the same in building Watertown to be a destination.

Anticipated expenses: architectural fees, city permits, electrical contractor, structural/retaining wall repair, gravel, concrete, labor, gate repair, patio furniture/anchor system.

Anticipated Timeline (estimated start and end dates): Start date asap, completion for Spring 2024 launch.

Business Information

How long has your business been established? 3 years

Please describe your business, including products and services offered and a brief history of operations.

We are a family owned wellness center with health services from trained healthcare professionals; spa services including salt, sauna, massage, and skincare; retail store with local organic goods, vendor consignments, and boutique shopping; grab'n'go organic, artisan bowls and refreshments like kombuchas and adaptogen seltzers; and occasional small events/education workshops offered to the community.

On our family's 7th generation farm, we grow USDA certified organic hemp and a full line of products. In addition to CBD products, we have our own supplement line that we sell in store and online. We began our business at farmer's markets and online and quickly established a large following of customers who wanted to see us in a retail location. We naturally chose our hometown and saw the potential for growth. After opening our first location, we quickly outgrew and relocated, added a spa, outgrew that, relocated to 200 W. Main St, and after purchasing our building and adjoining building 202 W. Main St, we moved our spa under the same roof. We have many plans for our unfinished spaces on the 2nd and 3rd level, however the purpose of applying for this grant is to begin renovations for use of our outdoor patio and seating on the intersection of Main Street and Water Street.

Additional Materials

The following materials must be included with your application:

- ✓ A copy of your lease agreement or proof of purchase of property
- ✓ Project Expenses Worksheet
- ✓ Two (2) years of Income Statement projections
- ✓ Last three (3) years of business income statements and most recent balance sheet
- ✓ Renderings, mock-ups, or architectural plans for new location
- ✓ Business plan (if opening/expanding business)

Applicant Agreement & Signature

I have read the program requirements and reviewed them with the Executive Director of the Watertown Redevelopment Authority, and I understand that my participation in the Beltz Foundation Downtown Watertown Business Grant Program is contingent upon my full compliance with all requirements. I understand that all grant funds must be used to cover eligible expenses as outlined in the program documents and will be reimbursed after submission of receipts. My application includes all the materials listed above.

Applicant Signature Jacalyn M Phillips Date 9/17/23

Landlord Signature (if lease) _____ Date _____