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

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

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

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

There will be two rounds of review for Project Qualification and Business Eligibility. ***Early deadline is May 16, 2024 at 5:00 pm with the final deadline of June 27, 2024 at 5:00 pm.*** All businesses only need to apply once by the final deadline. Those that are deemed ineligible after the first review are able to resubmit by the final deadline if their project can be revised or they can remedy disqualification issues.

If you have questions please reach out to the United Way of the Wabash Valley office at 812-235-6287 or info@uwwv.org.

**Project Qualification Survey**

1. Name of business
2. Address of business location requesting funds
3. Business owner name, email, and phone number
4. Point of contact for funding if different than owner: name, title, email and phone number
5. Current employee count distinguishing between full and part time employees.
6. Date business began operation (month/year)
7. Provide a short introduction to business and its overall goals.
8. Amount of funding requested - The funding amount requested here is not binding and can be adjusted if the business is selected for a full application. If there is an adjustment in funding amount the applicant will be asked to provide an explanation of the need to change the requested amount.
9. Provide a general breakdown of the intended use of the funds.
10. Is this funding request part of a larger project? If so, what is the overall project budget? Please highlight any additional outside funding being utilized.
11. Please indicate which of the below goals this funding will help your business achieve. (Please select all that apply)
    1. Retain existing businesses
    2. Retain existing employees
    3. Increase revenue
    4. Increase employees
12. How will this funding help your business achieve the above goal(s)? For each response, please include which goal(s) you are working toward and provide the projected outcome that will result from the funding.

Check mark questions with yes/no:

1. Is the business locally owned and operated?
2. Is the business a subsidiary of a larger corporation?
   1. If yes, please explain.
3. Is the business a publicly traded company?
4. Is the business in good standing with the Indiana Secretary of State as a Business Entity or if a sole proprietorship does the business have a certificate of assumed business name or doing-business- as (DBA) form record from the County Recorder?
   1. If no, please explain.
5. Are you a minority, women, or veteran-owned business?
   1. If yes, have you received state or federal MBE or WBE certification or are you in the process of receiving such certification?
6. Is your business facing any pending litigation or legal action?
   1. If yes, please explain.
7. Has your business been debarred, suspended, or otherwise excluded from or ineligible for participation in Federal assistance programs as noted in the attached SBA ineligible loan link ([not eligible for SBA loans](https://www.ecfr.gov/current/title-13/chapter-I/part-120/subpart-A/subject-group-ECFR6d9c2c4fd6e44c1/section-120.110))?

**Business Eligibility Documents to be Attached to Survey**

* Completed W-9 form.
* To verify a business has been in operation provide the business’s last two years of tax returns including any of the following forms (first page only): 1120, 1120S, 1065, or schedule C of personal tax return. If the most current fiscal year-end taxes are not yet completed a business’s most current available balance sheet and income statement along with the first page of a bank statement in the business’s name for March 2022, 2023, and 2024.
* Indiana Secretary of State Business Entity Certificate or a certificate of assumed business name or doing-business- as (DBA) form record from the County Recorder
* Verified employee count – UC-5A form report.