



**OFFICE OF THE ILLINOIS STATE TREASURER**

**INVEST IN ILLINOIS**

**BUSINESS INVEST – ILLINOIS SMALL  
BUSINESS COVID-19 RELIEF PROGRAM**

**ECONOMIC DEVELOPMENT METRICS FORM**

This Economic Development Metrics Form must be completed by an authorized representative (“Authorized Representative”) of the financial institution (“Financial Institution”) that has been given funding for a deposit already approved by the Treasurer under the Business Invest – Illinois Small Business COVID-19 Relief Program (“Program”). The Financial Institution may choose to submit the Economic Development Metric Form Spreadsheet in lieu of answering questions 1-10 below. The information on this Economic Development Metrics Form, and, if applicable, the Economic Development Metric Form Spreadsheet must be true and accurate.

1. Name of Financial Institution \_\_\_\_\_
2. How much money has the Financial Institution loaned to Eligible Borrowers under the Program?  
\_\_\_\_\_
3. To how many Eligible Borrowers has the Financial Institution loaned money under the Program?  
\_\_\_\_\_
4. Has the Financial Institution deferred any payments for Eligible Borrowers? Yes \_\_\_\_ No \_\_\_\_
  - A. If yes, what is the average duration of the deferment? \_\_\_\_\_
  - B. How many Borrowers have been granted a deferment? \_\_\_\_\_
5. Identify the number of Eligible Borrowers per NAICS code:

<u>Code</u>	<u>Industry Title</u>	<u>Code</u>	<u>Industry Title</u>
<u>11</u>	<u>Agriculture, Forestry, Fishing and Hunting</u>	<u>53</u>	<u>Real Estate Rental and Leasing</u>
<u>21</u>	<u>Mining</u>	<u>54</u>	<u>Professional, Scientific, and Technical Services</u>
<u>22</u>	<u>Utilities</u>	<u>55</u>	<u>Management of Companies and Enterprises</u>
<u>23</u>	<u>Construction</u>	<u>56</u>	<u>Administrative and Support and Waste Management and Remediation Services</u>
<u>31-33</u>	<u>Manufacturing</u>	<u>61</u>	<u>Educational Services</u>

<u>42</u>	<u>Wholesale Trade</u>	_____	<u>62</u>	<u>Health Care and Social Assistance</u>	_____
<u>44-45</u>	<u>Retail Trade</u>	_____	<u>71</u>	<u>Arts, Entertainment, and Recreation</u>	_____
<u>48-49</u>	<u>Transportation and Warehousing</u>	_____	<u>72</u>	<u>Accommodation and Food Services</u>	_____
<u>51</u>	<u>Information</u>	_____	<u>81</u>	<u>Other Services (except Public Administration)</u>	_____
<u>52</u>	<u>Finance and Insurance</u>	_____	<u>92</u>	<u>Public Administration</u>	_____

6. Identify the number of Eligible Borrowers per county of their business headquarters:

Adams	_____	Ford	_____	Livingston	_____	Randolph	_____
Alexander	_____	Franklin	_____	Logan	_____	Richland	_____
Bond	_____	Fulton	_____	McDonough	_____	Rock Island	_____
Boone	_____	Gallatin	_____	McHenry	_____	Saline	_____
Brown	_____	Greene	_____	McLean	_____	Sangamon	_____
Bureau	_____	Grundy	_____	Macon	_____	Schuyler	_____
Calhoun	_____	Hamilton	_____	Macoupin	_____	Scott	_____
Carroll	_____	Hancock	_____	Madison	_____	Shelby	_____
Cass	_____	Hardin	_____	Marion	_____	St. Clair	_____
Champaign	_____	Henderson	_____	Marshall	_____	Stark	_____
Christian	_____	Henry	_____	Mason	_____	Stephenson	_____
Clark	_____	Iroquois	_____	Massac	_____	Tazewell	_____
Clay	_____	Jackson	_____	Menard	_____	Union	_____
Clinton	_____	Jasper	_____	Mercer	_____	Vermilion	_____
Coles	_____	Jefferson	_____	Monroe	_____	Wabash	_____
Cook	_____	Jersey	_____	Montgomery	_____	Warren	_____
Crawford	_____	Jo Daviess	_____	Morgan	_____	Washington	_____
Cumberland	_____	Johnson	_____	Moultrie	_____	Wayne	_____
DeKalb	_____	Kane	_____	Ogle	_____	White	_____
DeWitt	_____	Kankakee	_____	Peoria	_____	Whiteside	_____
Douglas	_____	Kendall	_____	Perry	_____	Will	_____
DuPage	_____	Knox	_____	Piatt	_____	Williamson	_____
Edgar	_____	La Salle	_____	Pike	_____	Winnebago	_____
Edwards	_____	Lake	_____	Pope	_____	Woodford	_____
Effingham	_____	Lawrence	_____	Pulaski	_____		
Fayette	_____	Lee	_____	Putnam	_____		

7. Number of total employees located in Illinois for each Eligible Borrower (identify number of Eligible Borrowers per category below):

A. 0 - 50: \_\_\_\_\_

B. 51 - 100: \_\_\_\_\_

- C. 101 - 150: \_\_\_\_\_
- D. 151 - 200: \_\_\_\_\_
- E. 201 - 250: \_\_\_\_\_
- F. > 251: \_\_\_\_\_

8. The number of Eligible Borrowers for each Loan purpose:

- A. Fixed debt: \_\_\_\_\_
- B. Payroll: \_\_\_\_\_
- C. Accounts payable: \_\_\_\_\_
- D. Working capital: \_\_\_\_\_
- E. Bridge funding: \_\_\_\_\_
- F. All of the above: \_\_\_\_\_
- G. Other: \_\_\_\_\_
  - a. List examples:

9. Loan amount for each Eligible Borrower (identify number of Eligible Borrowers per category below):

- A. 0 - \$50,000: \_\_\_\_\_
- B. \$50,001 - \$250,000: \_\_\_\_\_
- C. \$250,001 - \$500,000: \_\_\_\_\_
- D. \$500,001 - \$1,000,000: \_\_\_\_\_
- E. \$1,000,001 - \$5,000,000: \_\_\_\_\_
- F. > \$5,000,001: \_\_\_\_\_

10. The number of Eligible Borrowers for each type of loan:

- A. Commercial line of credit: \_\_\_\_\_
- B. Fixed rate loan: \_\_\_\_\_
- C. Variable rate loan: \_\_\_\_\_
- D. Other (specify): \_\_\_\_\_

11. As applicable, preferred loan rate versus market rate and the number of Eligible Borrowers for each type:

- A. Number of Eligible Borrowers receiving a preferred loan rate: \_\_\_\_\_
- B. Number of Eligible Borrowers receiving a market loan rate: \_\_\_\_\_

12. How many Eligible Borrowers are minority-owned businesses, women-owned businesses, businesses owned by a person with a disability, qualified veteran-owned small businesses, or qualified service-disabled veteran-owned small businesses, as defined in Section 1 of the Business Enterprise for Minorities, Women, and Persons with Disabilities Act and Article 1 of the Illinois Procurement Code (“MWVD owned businesses”)?

- A. Minority-owned businesses: \_\_\_\_\_
  - i American Indian or Alaska Native: \_\_\_\_\_
  - ii Asian: \_\_\_\_\_
  - iii Black or African American: \_\_\_\_\_
  - iv Hispanic or Latino: \_\_\_\_\_
  - v Native Hawaiian or Other Pacific Islander: \_\_\_\_\_

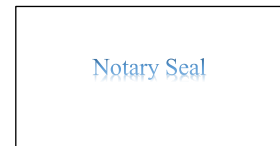
- B. Women-owned businesses: \_\_\_\_\_
- C. Businesses owned by a person with a disability: \_\_\_\_\_
- D. Veteran-owned small businesses: \_\_\_\_\_
- E. Qualified service-disabled veteran-owned small businesses: \_\_\_\_\_

Financial Institution certifies all information submitted in this Economic Development Metrics Form, documentation, and, if applicable, the Economic Development Metric Form Spreadsheet are true and accurate.

Authorized Representative Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**SUBSCRIBED and SWORN to before me (Notary signature date should match that of the authorized representative signature date)**

(Notary Public Signature) \_\_\_\_\_ This \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_



**For expedited process, please return this completed Economic Development Metrics Form via email to: [Investinillinois@illinoistreasurer.gov](mailto:Investinillinois@illinoistreasurer.gov)**

**Then mail the original signed and notarized Economic Development Metrics Form to:  
 Illinois State Treasurer Michael W. Frerichs  
 Invest In Illinois: Business Invest Program  
 1 East Old State Capitol Plaza  
 Springfield, Illinois 62739**

**For additional information or questions contact the Treasurer's Office at:  
 Phone: (217) 558 6217 • Fax: (217) 601-6177  
[www.illinoistreasurer.gov](http://www.illinoistreasurer.gov)**