



**REGULAR MEETING
ECONOMIC DEVELOPMENT COMMITTEE
Wednesday, October 7, 2020
5:00 PM
VILLAGE HALL – BOARD ROOM**

The mission of the Economic Development Committee (EDC) is to grow a stronger business climate by being an active partner with businesses, investors, and residents. The EDC shall strengthen economic development in the Village by developing business retention, expansion, and attraction programs; the creation and implementation of economic development plans and policies; being business ambassadors to the community; coordinating with other governments on projects; and submitting an annual Economic Development Position Report to the Village Board at the beginning of the fiscal year.

- 1. CALL TO ORDER**
- 2. ROLL CALL**
- 3. APPROVAL OF MINUTES OF SEPTEMBER 2, 2020 MEETING**
- 4. CONSIDERATION OF DOWNTOWN BUSINESS DISTRICT CONSULTANT RFP RESPONSES AND RECOMMENDATION REGARDING AWARD OF CONTRACT**
- 5. CONSIDERATION OF WINTER DINING OPTIONS IN BURR RIDGE**
- 6. OTHER CONSIDERATIONS**
- 7. PUBLIC COMMENT**
- 8. ADJOURNMENT**

MINUTES
ECONOMIC DEVELOPMENT COMMITTEE MEETING
September 2, 2020

CALL TO ORDER:

Mayor Gary Grasso called the meeting to order at 5:00 p.m. The meeting was held in person at the Village Hall.

ROLL CALL:

Present: Mayor Gary Grasso, Trustee Tony Schiappa, Mark Stangle, Ramzi Hassan, Paul Stettin, Sam Odeh, Kirsten Jepsen, Leslie Bowman, Debbie Hamilton, and Bhagwan Sharma (arrived at 5:10 pm.)

Absent: Michael Simmons

Also Present: Village Administrator Doug Pollock, Assistant Village Administrator Evan Walter, Communications & Public Relations Coordinator Janet Kowal, Management Analyst Andrez Beltran, Edwards Realty Marketing Director Taylor Blagrove, Patti's Sunrise Café owner John Manderscheid, Kirsten's Bakery co-owner Paul Jepsen, Capri Ristorante owner Filippo "Gigi" Rovito, Viewpoint Enclosures President Jeffrey Pavlatos, Viewpoint Business Development Manager Greg Flynn

PLEDGE

Mayor Grasso led the Committee in the Pledge of Allegiance.

MINUTES:

A **MOTION** was made by Ms. Hamilton to approve the Minutes from the August 14, 2020 meeting. The **MOTION** was seconded by Ms. Jepsen and approved by a vote of 9 - 0.

Mayor Grasso, citing the time restriction for several members of the public, asked to move item five on the agenda, Consideration of All-Season Enclosures at Village Restaurants. A **MOTION** was made by Mr. Stangle. The **MOTION** was seconded by Ms. Jepsen and approved by a vote of 9 - 0.

CONSIDERATION OF ALL SEASON ENCLOSURES AT VILLAGE RESTAURANTS

Mr. Walter stated that the tent program for outdoor dining has been a great success. Staff was directed to look into options for outdoor dining in winter, and in the future in general. One option that was discovered was Viewpoint Retractable Enclosure Systems, a local company that makes retractable outdoor enclosures that can be fitted onto existing properties. Staff asked them to present on the topic and their initial concepts for three restaurants in the Village. However, staff wanted to state this topic was on if the Committee wanted to incentivize these types of projects in the future, with the three presented being a pilot program.

Jeff Pavlatos, President of Viewpoint, stated his company specializes in retractable enclosures with operable skylights and rolling wall systems. The enclosures are made of clear polycarbonate and have the option of different insulation levels to maintain temperature. Systems can be built on the ground or on a brick seating wall for added aesthetics. Enclosures have options to open at every panel, the ceiling, or operate independently. They have installed several systems, with the two most recent in the Chicagoland area being at La Fiesta at 3333 W 111th Street in Chicago and Roots at 744 South Dearborn Street.

John Manderscheid of Patti's Sunrise Café stated that these systems could be a benefit post-COVID. Customer patterns may still favor outdoor-style seating environments compared to indoor. Additionally, it will help maximize his potential for seating. Filippo "Gigi" Rovito of Capri stated that the tents are big draws for his business, and an enclosure like this would help Burr Ridge continue to draw people downtown. Paul Jepsen of Kirsten's Bakery said that they are looking further in the future as a lot of their service is not done by seating in store but that it could still be helpful.

Mr. Hassan stated that these would be a good long-term investment in the downtown, not just next year for these businesses. Because of that, these would work perfectly as a project for the Business Development District as part of an incentive program. It would help show the Village is a partner in making the downtown better. He did agree that the return on investment had to make sense for businesses and property owners. Finally, he said that there has been talk of having the tent program again next year; perhaps those funds could be dedicated to incentivize instead.

Mayor Grasso stated that he thinks they are a great idea to distinguish Burr Ridge and increase revenue for those business owners. However, he would like to see more details on possible funding mechanisms and partnerships. Finally, since the enclosures would not be ready this winter, he directed staff to look at possible ways to have outdoor dining in the winter.

CONSIDERATION AND APPROVAL OF DRAFT DOWNTOWN BUSINESS DEVELOPMENT DISTRICT CONSULTANT RFP

Mr. Walter stated that at the recommendation of the Village Attorney that a consultant should be used to create the Business Development District. This was due to liability reasons instead of any shortcomings in staff analysis. As such, staff created a Request for Proposal (RFP) to be issued to find a qualified consultant. If approved by the EDC, it would go to the Village Board for approval and distribution at the September 14th Board meeting. The RFPs would be due by September 30th to Mr. Walter and would come to the October 7th EDC meeting for review and recommendation, with approval and award by the Board on October 12th.

Mayor Grasso asked if there was any discussion. There was none. A **MOTION** was made by Trustee Schiappa; the **MOTION** was seconded by Mr. Sharma. Approved by a vote of 8-0.

CONSIDERATION OF ESTABLISHMENT OF A DOWNTOWN BUSINESS ASSOCIATION

Mr. Beltran stated staff was asked to give information on Downtown Business Associations. He stated that they can be a key development tool for downtowns. He noted that there are three types: informal downtown groups, municipal led groups, and non-profit partnerships. He continued that while Downtown Business Associations are often started as informal groups or municipal led, the most successful are non-profits that leverage public and private funds as well as undertake community-building activities in the downtown.

Ms. Bowman thanked staff for the work. However, she stated that she was thinking of more an informal group on businesses in the downtown that could hold events and network. Mr. Stangle also asked why it would be focused solely on the downtown. Mr. Beltran stated that the defined geography focuses the goals. The Committee agreed that bringing Village businesses together irrespective of their location would be a good idea.

Mayor Grasso asked if the Committee supported an informal Burr Ridge Business Association. The Committee agreed. No action was taken.

OTHER CONSIDERATIONS

No other considerations were brought forward.

PUBLIC COMMENT

There were no public comments.

ADJOURNMENT

Mr. Stangle made the **MOTION** to adjourn the meeting to October 7, 2020 at 5:00 p.m., **SECONDED** by Trustee Schiappa. **APPROVED 9-0.** The meeting was adjourned at 6:15 P.m.

Respectfully submitted:

A handwritten signature in black ink, appearing to read "Andres Beltran". The signature is fluid and cursive, with the first name "Andres" and last name "Beltran" clearly distinguishable.

Andrez Beltran
Management Analyst



VILLAGE OF BURR RIDGE
MEMORANDUM

TO: Economic Development Committee (EDC)
Mayor Gary Grasso, Chairman

FROM: Evan Walter, Assistant Village Administrator

DATE: October 7, 2020

RE: **Business District RFP – Responses**

On September 14, the Board of Trustees approved the release of an RFP intended to solicit proposals related to the creation of a Business Development District (BDD) Feasibility Study and District Plan within downtown Burr Ridge. The Village received three (3) responses to this RFP prior to its October 2 deadline. Staff has attached the original RFP as well as the submitted proposals from McKenna and Associates, SB Friedman, and Teska and Associates for review. Staff requests feedback from the EDC as to a recommendation to the Board to award a contract to a particular firm. The proposal evaluation criteria was as follows in Table 1, along with staff's scoring of each of the proposals.

CRITERIA	Possible Points	McKenna	SB Friedman	Teska
Project Approach	40	33	40	37
Vendor Experience	20	20	20	18
Project Team Qualifications	20	20	20	15
Schedule	10	8	10	7
Costs	10	10	9	8
TOTAL	100	91	99	85

Staff's recommendation is that **SB Friedman** be retained for the creation of a BDD feasibility study and district plan as prescribed in the RFP for the following reasons:

- McKenna's response noted that "[the respondent] is prepared to deliver the services described herein at any pace desired by the Village", SB Friedman's response noted a concrete "60-75 days" to deliver their results to the Village.
- SB Friedman's response detailed a specific 14-step plan for the analysis process described in the RFP, whereas the other responses did not explain their process as clearly.
- SB Friedman's response was extremely detailed as to how it would perform the requested services (the "Project Approach"), including a thorough explanation as to how COVID-19 would affect their analysis as well as documenting their experience of retail-specific sectors.
- SB Friedman (specifically Mr. Dickinson of this firm) has also previously worked with the Village in evaluating the potential economic impact of the Village Center while still under development. SB Friedman also clearly delineated how staff time would be dedicated to the project, including a by-hours analysis that is broken out by task.



VILLAGE OF BURR RIDGE, ILLINOIS

REQUEST FOR PROPOSALS (RFP)

FOR

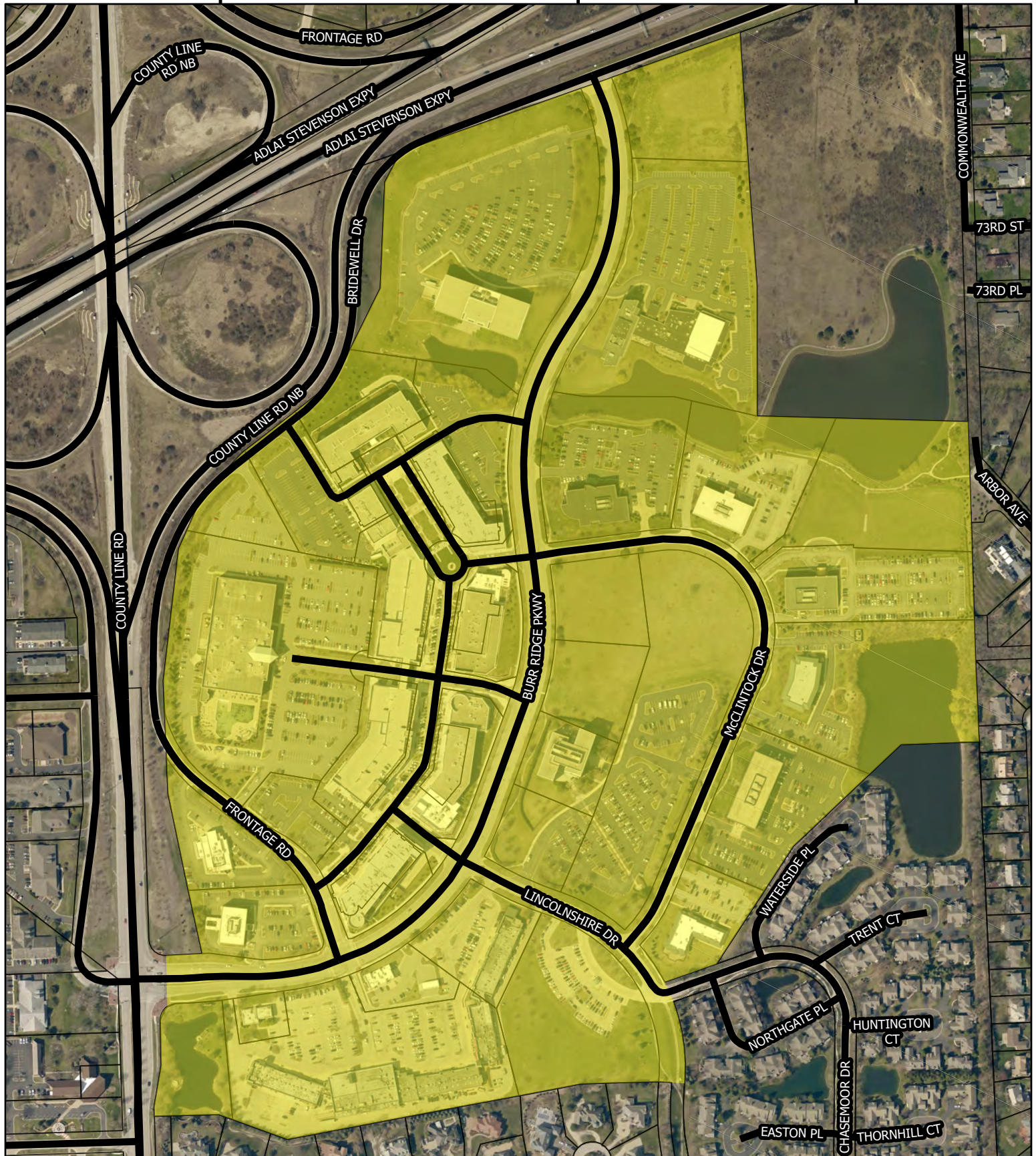
CREATION OF BUSINESS DEVELOPMENT DISTRICT (BDD) FEASIBILITY STUDY AND DISTRICT PLAN WITHIN DOWNTOWN BURR RIDGE

**Village of Burr Ridge, Illinois
7660 County Line Road
Burr Ridge, Illinois 60527**

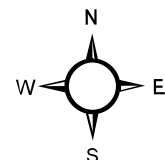
**Release Date:
Receipt Date:
Effective Award Date:**

**September 14, 2020
October 2, 2020
October 12, 2020**

Proposed Business Development District Map



Proposed Business
Development
District Boundary



0 250 500 1,000 Feet

REQUEST FOR PROPOSAL NOTICE

The Village of Burr Ridge (hereinafter "Village"), located in DuPage and Cook County Illinois, is seeking proposals from qualified firms for work related to the creation of a Business Development District (hereinafter "BDD" or "District" interchangeably), in accordance with Illinois State Statute, to promote the development and revitalization of its downtown corridor. Specifically, the Village is considering the financial and land use development feasibility of establishing a BDD District in downtown Burr Ridge as illustrated in Appendix 1.

The designated staff contact may only be contacted by email or other written forms of correspondence. Faxes will not be accepted. Vendors who intend to submit a proposal are encouraged to request a copy of this document prior to submitting their final proposal. Any prospective Vendor who requests a copy of this RFP shall be included in any Village supplemental distributions. No communication seeking to in any way influence the outcome of the proposal evaluation is allowed between submitting Vendors and Village officials, representatives, and/or personnel during the evaluation process. Failure to comply with this requirement will result in disqualification. Any inquiries regarding this Request for Proposal and all official submissions of Proposals shall be directed to the following in writing via email:

Evan Walter
Assistant Village Administrator
ewalter@burr-ridge.gov

SECTION I - INTRODUCTION

Located within 20 miles of downtown Chicago, and O'Hare and Midway airports, Burr Ridge is an affluent Chicagoland suburb home to approximately 11,000 residents, with large homes and a diverse mix of commercial development. Existing development in the community consists of approximately 3,000 single-family homes, 200 condominium units, 350,000 square feet of retail space, 5 million square feet of office/industrial space, and 5 hotels consisting of approximately 650 available rooms. Downtown Burr Ridge is home to two major shopping centers (Village Center and County Line Square), the Marriott hotel, as well as the primarily vacant TCF Bank parcel located in the heart of the area. The Village seeks to develop and redevelop the downtown area to ensure its economic vitality as well as serve as a point of community pride into the future.

SECTION II - PROJECT SCHEDULE/TERM OF CONTRACT

The Village intends to review all proposals and select a qualified firm to perform necessary services (henceforth "Vendor") by October 12, 2020. The anticipated timetable for the process is as follows:

- Solicitation of Request for Proposals Released by the Village – September 14, 2020
- Vendor Inquiry Deadline for Questions Related to the RFP – September 21, 2020
- Village's written response to Vendor questions for assistance with bid proposals – no later than September 23, 2020
- Vendor Proposals Submitted to the Village - 2:00 PM, October 2, 2020
- Possible Interviews with Economic Development Committee (EDC) in a public meeting – October 7, 2020
- Selection of Vendor and Award of Contract – October 12, 2020

Proposals submitted and work provided shall be valid through April 1, 2021 or as agreed upon between Vendor and Village. A contract for services shall be executed between the Village and Vendor with contract services anticipated to become effective on October 26, 2020 after the Board directs an award to be made on October 12, 2020.

SECTION III – OBJECTIVES AND DELIVERABLES

It is the intent of the Village to review and assess the RFP responses to determine if the response from solicited Vendors can meet the needs of the proposed Scope of Work. The project objectives are:

- Prepare BDD Feasibility Study and District Plan in accordance with all statutory definitions, conditions, and requirements. Provide file documentation to assure proper support of eligibility findings.
- Recommend and refine boundaries for BDD in accordance with statutory requirements.
- Provide a costs/benefit analysis illustrating how the Village can maximize incremental financial benefit relative to the cost for the BDD.
- Investigate the desirability and feasibility as well as timing implications of utilizing BDD funding for projects.
- Attend 1-2 public meetings as necessary to present and discuss findings.

A final report shall summarize the findings set forth above, and should generate confidence in the District's overall fundamentals. The Vendor will present the feasibility study findings with key Village stakeholders at a mutually agreed upon time and place. Key Village documents that will be necessary for a complete understanding of the services provided, including the Comprehensive Plan and the Zoning Map and Zoning Ordinance are available on the Village website at www.burr-ridge.gov.

SECTION IV – PROPOSAL REQUIREMENTS

Proposers responding to the RFP must include the following information:

1. Cover letter stating interest and signed by a person authorizing to bind the Vendor.
2. Statement of project understanding and time sensitivity.
3. Outline and timeline for completing the scope of work.
4. The Vendor must provide a "not to exceed" service fee for completing the scope of work for the proposed BDD. The fee should represent the amount of work to be undertaken for this project and should be broken down by each task. The Vendor must provide a list of its firm's hourly rates for all employees who will be assigned to the project. All professional service fees and reimbursable expenses must be included as a not to exceed amount for completing the work assigned.
5. Background information on staff to be assigned to this project to include a projected number of hours with an hourly rate.
6. Background on Vendor firm.
7. Financial stability and insurance: Vendor must be able to demonstrate proof of insurance and financial stability to ensure performance over the duration of the contract.
8. References: A list of communities (include contact person, email and telephone number) who used your services to prepare a BDD Eligibility Study.

All proposals must be received at the address below no later than **2:00 PM – October 2, 2020 to the attention of the following staff member:**

Village of Burr Ridge
c/o Evan Walter, Assistant Village Administrator
7660 County Line Road
Burr Ridge, Illinois 60527

Vendors must submit eight (8) bound proposals in a sealed package or envelope. Proposals must be hand delivered or mailed. Proposals that are postmarked prior to the submission deadline but received after the submission deadline will not be accepted. Proposals must be signed by the authorized official of the Vendor. The submission of the Proposal grants permission to the Village to make inquiries concerning the Vendor and its principals to any persons or firms the Village deems appropriate.

SECTION VIII - PROPOSAL EVALUATION CRITERIA

The proposals will be reviewed and scored to determine if the requirements outlined in Section IV are met. In the event that no firms meet one or more of the mandatory requirements, the Village reserves the right to continue the evaluation of the qualifications, which most closely meet the mandatory requirements of this RFP. Proposals will be reviewed by the Village and scored against the criteria below. The following criteria will be used in evaluating each of the carrier responses:

CRITERIA	POSSIBLE POINTS
Project Approach	40
Vendor Experience	20
Project Team Qualifications	20
Schedule	10
Costs	10
TOTAL AVAILABLE POINTS	100

ATTACHMENT A - INSTRUCTIONS TO BIDDERS

The general rules and conditions that follow apply to all bids requested and accepted by the Village unless otherwise specified. Bidders or their authorized representatives are expected to inform themselves as to the conditions, requirements, and Specifications before submitting bids. Failure to do so will be at the bidder's own risk. Submitting of a bid is an assumption that Vendor has familiarized themselves with all conditions and intends to comply with them unless noted otherwise. Bid Documents shall include:

1. FORMS

All bids must be submitted on the forms provided, complete, intact, properly signed, and submitted in a sealed envelope. All bids must be delivered to the appropriate Village representative prior to the bid opening date and time to be considered. Bids must be identified as such on the outside of the sealed envelope. This can be done by label as may be provided by the Village, or by marking the package "Business Development District Consultancy Services" and with the following information: company's name, address, item bid, date and time of opening.

2. ALTERNATE BIDS

The RFP describes the services that are necessary to meet the performance requirements of the Village. It is not the desire or the intent to eliminate or exclude any bidder from bidding because of minor deviations, alternates or changes; however, the Village will not accept bids for work that is substantially different from what is described in this RFP. The Village shall be the sole and final judge unequivocally as to whether a Proposal meets the necessary needs of the Village. This decision is final and will not be subject to recourse.

3. RECEIVING OF BIDS AND LATE BIDS

Bids received prior to the time of opening will be securely kept, unopened. The Assistant Village Administrator, or their designee, whose duty it is to open the bids, will decide when the specified time has arrived, and no bid received thereafter will be considered. No responsibility will be attached to the Village or its representatives for the premature or non-opening of a bid not properly addressed and identified, except as otherwise provided by law. Bids arriving after the specified time, whether sent by mail, courier, or in person, will not be accepted, regardless of their origin's date stamp. It is the bidder's responsibility for timely delivery regardless of the method used.

5. WITHDRAWAL OF BIDS

A written request for the withdrawal of a bid or any part thereof may be granted if the request is received by the Director of the requesting Department prior to the specified time of opening. After the opening, the bidder cannot withdraw or cancel their bid for a period of sixty (60) calendar days, or such longer time as stated in the bid documents.

6. CONSIDERATION OF BID

No bid will be accepted from or contract awarded to any person, firm or corporation that is in arrears or is in default to the Village upon any debt or contract, or that is a defaulter, as surety or otherwise, upon any obligation to the Village or had failed to perform faithfully any previous contract with the Village. The bidder, if requested, shall present, within 48 hours, evidence satisfactory to the Village of performance ability and possession of necessary facilities, pecuniary resources and adequate insurance to comply with the terms of these Specifications and contract document.

7. PRICES

Unit prices shall be shown for each unit on which there is a bid. Unit prices shall not include any local, state or federal taxes. The Village is exempt, by law, from paying state and village retailer's occupation tax, service occupation tax, and federal excise tax. The Village will supply the successful bidder with its tax exemption number. Cash discounts will not be considered in determining overall price.

8. AWARD OR REJECTION

The Village reserves the right to reject and/or award any and all bids or parts thereof and to waive formalities and technicalities according to the best interests of the Village. Any bid

submitted will be binding for ninety (90) days subsequent to the date of the bid opening. Bidders shall make all investigations necessary to thoroughly inform themselves regarding the equipment or supplies to be furnished in accordance with the bid. No plea of ignorance by the bidder of conditions that exist or that may hereafter exist because of failure or omission on the part of the bidder to make the necessary examinations and investigations will be accepted as a basis for varying the requirements of the Village of the compensation to the bidder. Any exceptions not taken by the bidder shall be assumed by the Village to be included. A contract will be awarded to the lowest qualified and responsible bidder complying with the conditions of the contract documents only when it is in the best interest of the Village to accept the bid. The Village shall be the sole judge of compliance with the Specifications and reserves the right to accept or reject any and/or all bids or parts thereof.

9. PAYMENT

Payment for services rendered with all stipulations relating to the bid/contract will be made in accordance with the Illinois Prompt Payment Act after the contract is awarded.

10. REQUIREMENT OF BIDDER

The successful bidder shall, within ten (10) days after notification of the award: a) enter into a contract in writing with the Village covering all matters and things as are set forth in the specifications and their bid; b) carry insurance acceptable to the Village, covering public liability, property damage, and worker's compensation. Said time limit may be waived or increased at the Village's sole discretion.

11. COMPLIANCE WITH ALL LAWS

All work under the contract must be executed in accordance with all applicable federal, state and local laws, ordinances, rules and regulations, including:

1. Provide a drug free workplace pursuant to the Illinois Drug Free Workplace Act (30 ILCS 580/1, et seq.);
2. Comply with the Illinois Public Works Employment Discrimination Act (775 ILCS 10/1, et seq.);
3. Comply with Article 2 of the Illinois Human Rights Act (775 ILCS 5/2-101, et seq.), including establishment and maintenance of a sexual harassment policy as required by Section 2-105, and the Rules and Regulations of the Illinois Department of Human Rights, including the provisions of the EQUAL EMPLOYMENT OPPORTUNITY CLAUSE, which are a material term of all public contracts, see Title 44, Part 750, Section 750, APPENDIX A, Illinois Administrative Code, Equal Employment Opportunity Clause (See also Paragraph 19 herein);
4. Comply with the Substance Abuse Prevention on Public Works Projects Act, 820 ILCS 265/1 *et seq.*, and
5. Comply with the American with Disabilities Act.

12. CONTRACT ALTERATIONS

No amendment of a contract shall be valid unless made in writing and signed by the Mayor, Village Administrator, or their authorized representative.

13. NOTICES

All notices required by the contract shall be given in writing.

14. NONASSIGNABILITY

The Vendor shall not assign the contract, or any part thereof, to any other person, firm or corporation without the previous written consent of the Village. Such assignment shall not relieve the Vendor from their obligations or change the terms of the contract.

15. INDEMNITY

The Vendor shall indemnify the Village, its officers and employees from any and all liability, losses or damages, including attorney's fees and costs of defense, the Village may suffer as a result of claims, demands, suits, actions or proceedings of any kind or nature, including workers' compensation claims, in any way resulting from or arising out of the operations of the Vendor under this contract, including operations of subcontractors; and the Vendor shall, at his own expense, appear, defend, and pay all fees of attorneys and all costs and other expenses arising therefrom or incurred in connection therewith; and, if any judgments shall be rendered against the Village in any such action, the contractor shall, at their own expense, satisfy and discharge same. The Vendor expressly understands and agrees that any performance bond or insurance protection required by the contract, or otherwise provided by the Vendor, shall in no way limit the responsibility to indemnify and defend the Village as herein provided.

16. EQUAL EMPLOYMENT OPPORTUNITY

The Vendor shall comply with the provisions of the Equal Employment Opportunity Clause.

17. BID PERFORMANCE DEPOSIT

When it is required, it will be so stated elsewhere within this bid package along with the amount required. The deposit is to be in the form of a certified check, or a bank cashier's check. All bid performance deposit checks will be retained by the Village until the bid award is made, at which time the checks will be promptly returned to the unsuccessful bidders. The bid performance deposit check of the successful bidder will be retained until the services have been rendered or completed/installed and found to comply with the specification or until surety bonding requirements have been satisfied and proof of insurance coverage is provided in accordance with the Special Provisions Section of these specifications.

18. ACCEPTANCE

After the acceptance and award of the bid, this instruction to bidders, and all other portions of the bid documents, including the specifications, will constitute part of the legal contract between the Village and the successful bidder.

19. DEFAULT

The Village may terminate a contract by written notice of default to the Vendor if the Vendor:

- a. Fails to make delivery or perform the services within the time frame specified in the Specifications, or
- b. Fails to make progress so as to endanger performance of the contract, or
- c. Fails to provide or maintain in full force and effect, the liability and indemnification coverages or performance bond as is required; or
- d. Services provided by the Vendor jeopardize the public safety, as determined by the Village.

If the Village terminates the contract, the Village may procure services similar to those so terminated, and the Vendor shall be liable to the Village for any excess costs for similar services, unless the Vendor provides acceptable evidence that failure to perform the contract was due to causes beyond the control and without the fault or negligence of the Vendor.

20. SPECIAL CONDITIONS

Wherever special conditions/requirements are written into the Specifications or Special Provisions that are in conflict with conditions stated in these Instructions to Bidders, the conditions stated in the Specifications or Special Provisions/Requirements shall take precedence.

21. GENERAL GUARANTY

Vendor represents and warrants to the Village that it has the experience and ability to perform the services required by the RFP, and that it will perform said services in a professional, competent and timely manner, as represented and suitable for the performance of the RFP. Neither the final certificate of payment nor any provision in the contract nor partial or entire use of the product/ improvement/ services embraced in this contract by the Village or the Public shall constitute an acceptance of work not done in accordance with the contract, or relieve the contractor of liability in respect to any express warranties or responsibility for failure to comply with the terms of those contract documents. It is expressly agreed by the parties hereto that in the event any defects or imperfections in the materials or workmanship to be furnished by the Vendor herein appear within the period of one year from the date of completion of all the work mentioned herein and acceptance thereof by the Village, the Vendor will, upon notice from said Village (which notice may be given by letter to said Vendor to the business address of the contractor shown in the proposal), repair and make good at their own cost any such defects or imperfections and replace any defective or imperfect materials or workmanship with other materials or workmanship satisfactory to said Village, and furnish all such new materials and labor as may be necessary to do so; and in the event of the failure, refusal or delay of said workmanship or materials said Village may do so or have same done by others, and said Vendor and surety or sureties on their bond given for the faithful performance of this contract shall be liable to the Village for all damages and expenses occasioned by such failure, refusal or delay.

22. BID CERTIFICATION FORM

All bid submittals must include a signed Bid Certification Form (copy included in Bid Documents) certifying that the bidder is in compliance with Sections 33E-3 and 33E-4 of the Illinois Criminal Code regarding bid rotating and bid-rigging. Illinois State Law Article 33E-3 and 33E-4 states that it is unlawful to participate in bid-rigging and/or bid rotating. Therefore, all bidders must certify that they are not barred from bidding on the contract as a result of a violation of State Law 33E-3 and/or 33E-4, prohibiting bid-rigging and bid rotation. It is necessary that this be done under oath. Therefore, the form included with the bid submittal sheets

must be notarized. Contractor certifies that he/she/it is not delinquent in payment of any taxes to Illinois Department of Revenue.

23. DEVIATIONS

Unless denoted “No Substitution”, the Village’s minimum required Specifications may be exceeded. Final bid acceptance shall be based upon that bid deemed most favorable to the interests of the Village after all bids have been examined and canvassed.

24. INDEPENDENT CONTRACTOR

The Vendor will be retained by the Village only for the purposes and to the extent set forth in this Agreement, and their relation to the Village shall, during the term of this Agreement and the period of its services hereunder, be that of an independent contractor. The Vendor shall be free to use such time, energy and skill as he/she is obligated to devote hereunder to the Village, in such manner as he/she sees fit. The Vendor shall not be considered as having an employee status, nor shall its employees be entitled to any benefits available for the regular employees of the Village.



**PROPOSAL FOR
THE VILLAGE OF BURR RIDGE**

**RE: BUSINESS DEVELOPMENT DISTRICT
CONSULTING SERVICES**

Prepared By: Kane, McKenna and Associates, Inc.

September 30, 2020

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SECTION I

Cover Letter

September 30, 2020



Mr. Evan Walter
Assistant Village Manager
Village of Burr Ridge
7660 County Line Road
Burr Ridge, Illinois 60527

Dear Mr. Walter:

Kane, McKenna and Associates, Inc. ("KMA") is pleased to submit its qualifications and this proposal in response to the Village of Burr Ridge's (the "Village") request for assistance in formulating a Business Development District ("BDD" or "BD") pursuant to Illinois law for a certain area in the Village's downtown. We would welcome the opportunity to work with the Village and we believe that our firm is uniquely structured to perform the scope of work in which the Village is interested.

KMA has been a leader for many years in: (1) the formulation of economic development strategies; (2) the technical evaluation of development proposals; (3) the analysis of the economic implications of the utilization of community resources; and (4) the implementation of appropriate financing strategies.

Among the municipalities which KMA has assisted in various forms of economic development strategies are: River Forest, Berwyn, Brookfield, Riverside, Willowbrook, La Grange, River Grove, Elmwood Park, Countryside, Hodgkins, and Elmhurst. Included in our array of services to these municipalities have been: (a) evaluation of appropriate economic development strategies for various community sectors and objectives; (b) specific analysis of developer/business proposals; (c) establishment and funding of economic development districts; (d) evaluation and establishment of all types of special economic development districts, and (e) sensitivity to any historic or local character of project areas.

We believe that our experience provides us with a unique perspective of the competing and complementary needs of both the public and private sector.

KMA is also familiar with the downtown area, having performed several assessments of the viability of some form of economic development incentives before and after some development of the area.

Mr. Evan Walter
Page Two
September 30, 2020



Statement of Qualifications – Consultant Experience

- KMA employs 9 professional and 1 administrative employees. The firm was founded in 1984 and has, throughout its history provided financial advisory and economic development consulting services, principally within the State of Illinois.
- KMA was a founding member of the ITIA; Mr. McKenna remains a member of the Board of said association.
- KMA has been involved in over 300 TIF Districts, including the formation and designation of over 250 TIF Districts, and has examined approximately 35 areas for potential Business District designation under State law.
- KMA is sensitive to the Village's timetable and is prepared to begin immediately.

Mr. Philip R. McKenna, Chairman, would serve as the Project Manager. Mr. Robert Rychlicki, President and Mr. DJ Fiore, Assistant Vice President would assist Mr. McKenna as needed in the implementation of the Scope of Services.

We appreciate this opportunity to present our firm's qualifications and look forward to being able to meet with the Village regarding next steps.

Sincerely,

KANE, MCKENNA AND ASSOCIATES, INC.

A handwritten signature in dark ink, appearing to read 'Philip R. McKenna', with a stylized flourish at the end.

Philip R. McKenna
Chairman

SECTION II

Introduction/Overview of Consultant's Approach

INTRODUCTION

Kane, McKenna and Associates, Inc. (“Kane, McKenna” or “KMA” or the “Consultant”) is pleased to respond to the Village of Burr Ridge’s (the “Village”) request for professional services to investigate and recommend strategies related to the Potential for a Business Development District (“BDD” or “BD”) in its downtown.

KMA is a consultant with specific expertise in redevelopment related matters and has dealt with virtually every technique possible in Illinois for redevelopment finance – Tax Increment Finance (TIF), Business District (BD), Special Service Areas (SSA), Special Assessments, Sales Tax Sharing, Property Tax Abatement, CDBG funds and local County, State and Federal grant/loan programs.

As for our expertise in producing viable financing plans for communities incorporating various economic development tools, we believe our record in the industry is unparalleled. Our abilities in creating viable solutions for addressing needs inherent to area revitalization programs are also highly regarded. We can provide dozens of references from community officials who have benefited from our involvement, and we are committed to the same level of professionalism with your Village.

OVERVIEW OF CONSULTANT'S APPROACH

An understanding of our philosophy will not only provide the Village with insight regarding our approach to financial advisory and economic development services, but will provide you with a clear idea of what you can expect from us throughout the process.

When a client is considering establishing or expanding of a Business Development District, our approach is to explore all of the economic development implications to the Village. Generally, our evaluation of potential methods to meet the objectives of the Village would be based upon the following principal objectives:

- (1) Leveraging current resources of the Village to maximize the benefits of such resources;
- (2) Being responsive to the conservation of current efficient businesses;
- (3) Measuring potential for new tax generating development;
- (4) Taking a long-term orientation to assure that beneficiaries, current and future, share and benefit appropriately in the cost of long-term development projects;
- (5) Enhancing the efficiency of providing for multiple projects at one time, to maximize their effectiveness and encourage spin-off development; and
- (6) Leaving the Village with maximum financial flexibility for the future, as well as poised to respond to market changes.

The Consultant's "Scope of Services", included in Section III, illustrates more completely the detailed advisory services which our firm will provide to the Village.

The Consultant will prepare a realistic BD Redevelopment Plan that incorporates the Village goals and objectives for the proposed redevelopment area and recommended financing and economic development strategies and public improvements.

CONSULTANT'S APPROACH AND PROJECT UNDERSTANDING FOR THE VILLAGE

We are fortunate to have extensive experience in assisting communities redevelop mixed-use and commercial areas. Our extensive history in helping clients achieve their economic development goals will, we believe, provide us with an excellent basis from which to perform the services needed to investigate the formation of a Business Development District. KMA is highly sensitive to the Village's timing requirements.

KMA understands that the Village intends to achieve a multitude of goals for the area cited. Paramount among these are:

- 1) Implement steps to review the proposed area as quickly as possible.
- 2) Work as efficiently as possible when establishing said area by working in conjunction with Village staff and, as requested, Village Board and coordinate any next steps relating to designation.
- 3) Renewal and stabilization of important commercial uses within the Village.
- 4) Attraction of new development projects and private investors as desired by the Village to the designated area.

Our purpose in undertaking the services offered within this proposal will be to ensure that the priorities identified and the processes established to accomplish these goals are achieved in the manner intended by the Village. That is, very efficiently and in a way that maximizes all key economic development results.

KMA is prepared to deliver the services described herein at any pace desired by the Village. Our approach will be to apply all resources required to accomplish all tasks at a high level of quality while maintaining constant communication with the Village officials and staff on our progress.

SECTION III

Scope of Services

TASK ONE: Prepare BD Eligibility Report

A. Inventory of Village Proposed BD Properties

1. The Consultant will assist the Village staff to determine and confirm likely boundaries for any new BD based upon site visits, property characteristics and results of any analysis presently or previously undertaken by the Village. Village staff would provide assistance relating to GIS maps, land use surveys, Comprehensive Plan or Similar Statements of goals and objectives and sources of information relating to term of vacancy, utility service, etc.
2. Identify any opportunities currently evident (e.g., property for sale) and potential ways to create opportunities.
3. Review with the Village the potential pros and cons, costs and benefits, and advantages and disadvantages of viable funding options available, including but not limited to a BD.
4. Review with the Village any infrastructure needs in the proposed BD area.
5. Review with the Village the benefits and the overall goals and objectives of the proposed BD and comment on such goals and objectives relative to experience with BD process and economic development best practices.

B. Recommendation of Financing Options for BD Designation

1. Provide advice and consultation related to appropriate incentive mechanisms or public financing techniques which could be applied within the proposed BD area. Included in this would be a review of which BD eligible costs would be effective and appropriate.
2. In the event that certain local financing programs or economic development alternatives for redevelopment areas such as County assessments, State grants, special service areas (SSA), special assessment districts (SSD) or “hybrids” of such alternatives may be applicable, the Consultant would identify the benefits and costs of programs and their conditions for use (including State statutes which must be met) by the Village.
3. Review alternatives and amounts generated by BD sales tax at various levels.

C. Review and Documentation of BD Qualification Factors

1. Review with the Village the preliminary boundaries for the BD area, as well as initial redevelopment goals and objectives specific to the BD.

2. Review the characteristics of the proposed BD site and adjacent properties in order to recommend precise proposed boundaries for a BD, and to assess the potential qualification factors (strengths and weaknesses) of any identified area in accordance with the provisions of Illinois law. Review would include site surveys, review of past plans and policy materials, discussions with Village officials and staff, site tours/examination, and sales data, if available.
3. The Consultant will be available to discuss the findings with the Village in person and on telephone as needed prior to completing the report.
4. Determine whether proposed costs and revenues to be incurred and/or generated from any proposed redevelopment project area are reasonable, feasible and acceptable assumptions for the intended area to be redeveloped and are conformant with Village objectives.

TASK TWO: Prepare BD Redevelopment Plan

A. Prepare Resolutions of Intent and Initial Meetings

1. Assist the Village Attorney to prepare resolution of intent for the proposed BD, if needed.
2. Attend Village Board meeting(s) to review the purpose of the resolution of intent and respond to questions of officials and/or public.
3. Determine if initial or educational meetings are needed for commercial/retail tenants and/or taxpayers.

B. Preparation of BD Redevelopment Plan

1. Review with the Village the preliminary boundaries for the Plan as well as redevelopment goals and objectives.
2. Prepare a BD Plan which includes:
 - A statement of redevelopment goals and objectives;
 - Examination of BD qualification factors and presentation or rationale for basis under which the BD is to be justified;
 - A statement of eligible redevelopment activities;
 - Presentation of estimated costs for the redevelopment projects contemplated for implementation under the Plan; and
 - A detailed discussion of impediments to the successful redevelopment of the project area and measures the Village could undertake to eliminate such barriers so to promote economic revitalization of the project area.

The Consultant will be available to discuss the findings with the Village in meetings prior to completing the report, including meeting with affected business owners, tenants, and property owners.

3. In the event that other local financing programs or economic development alternatives may be applicable, the Consultant would identify these programs and their conditions for use by the Village.

C. Provide BD Increment and Cost Projections

1. Assist Village staff to prepare the preliminary feasibility analysis of potential redevelopment projects' incremental revenue (gross and net) at various potential BD sales tax (or, if applicable, hotel tax) levels, and/or costs in order to summarize the potential funding advantages/disadvantages of various strategies.
2. Identify for the Village principal strategies for incentives and potential funding mechanisms based upon the potential redevelopment projects' ability to generate property, and/or other incremental taxes to cover anticipated costs and/or debt service requirements.

D. Finalize Redevelopment Project

1. In conjunction with Village staff, finalize BD boundaries, and assist in the process of preparation of legal descriptions.
2. Subsequent to the review of the draft redevelopment plan by the Village Board, Village staff, and stakeholders within the BD, revise the redevelopment plan sections in order to add relevant comments and/or corrections. (Note: We believe that "buy in" by impacted stockholders is critical to program success).
3. Work with Village Counsel to meet all the requirements of appropriate law so to insure proper establishment of the BD.
4. Assist Village Counsel in preparation of the appropriate Ordinances required for adoption of the BD plan.
5. Assist Village to establish and maintain complete documentation files to assure proper support of eligibility findings in order to support legal standing for establishment and/or amendment of the BD.

E. Prepare Public Hearing Notices

1. Assist Village staff to prepare the public hearing resolution and the BD public notices.
2. Prepare mailings as part of notices.

F. Attend Public Hearing and Other Meetings

1. Assist the Village by participating in the required public hearing, and meetings with all interested and affected parties, including property owners and tenants.
2. Work with Village staff to meet all the requirements of Illinois law.

TASK THREE: Financial Analysis (OPTIONAL)

Other Requirements

1. Assist Village staff in evaluating and preparing detailed financial projections that relate to the proposed BD. Evaluation would be conducted on the feasibility of such proposals given factors such as physical improvement requirements, proposed user mix, phased developments, project costs and timetable for implementation.
2. Provide recommendations to the Village for the funding strategies to be evaluated with regards to their likelihood to succeed and to meet Village's economic development goals. Meet with Village to discuss the report and to obtain Village input prior to formal submission. Make an oral presentation to the Village as deemed appropriate by the Village.
3. Assist the Village in finalizing strategies and priorities, providing professional opinions regarding alternatives available to the Village so they can determine the best options to fund the redevelopment projects.

4. Advise the Village regarding provisions required that might impact either the proposed financial structure or the Village's ability to deliver economic development funding assistance in a timely manner. Provide the Village with an analysis of proposed tax incremental BD sales tax (or, if applicable, hotel taxes) and any other revenue/cost projections and summarize the potential funding advantages/disadvantages of various funding strategies.
5. Make a thorough review of the proposed development strategies to advise the Village of any problems or concerns regarding provisions and/or conditions that might adversely impact any of the proposed financial structures.
6. Prepare a Financing Plan, as and if requested, including the following components:
 - Timing and sequence of receipt of proposed incremental funds flows;
 - Proposed timing and sequence of expenditures of public funds;
 - Testing of alternative assumptions of development scenarios (best and worst case); and
 - Identified issues associated with retirement of any obligations.

SECTION IV

Fees for Services

FEES FOR SERVICES

KMA normally bills for services on an hourly fee basis for the services requested. We find this more prudent for the client – since the client can exercise control on KMA attendance at meetings, involvement in certain implementation tasks, etc. We also believe that it is more prudent for KMA because we can then budget our time and resources most appropriately.

Fees would be charged monthly at the hourly rates set forth below.

<u>Personnel</u>	<u>Hourly Rates</u>
Chairman/President	\$200.00/Hour
Executive Vice President	\$175.00/Hour
Officers	\$150.00/Hour
Associates	\$100.00/Hour
Research	\$ 60.00/Hour
Administrative	\$ 25.00/Hour

All such fees could be reimbursed to the Village through BD revenues or bonds, if applicable.

Task 1 and 2

Estimated Fees for Eligibility and Implementation of BD \$12,000 - \$18,000

NOT TO EXCEED FOR TASKS 1 AND 2 \$16,000

- * Note: (1) To the extent that the Village wishes to take responsibility for the mailings and/or certain components of data collection, the cost could be reduced. We would be available to discuss these options with the Village.
(2) Certain other fees from other professionals, such as attorneys and engineers cannot be estimated and are not part of KMA fees.

Task 3 (if requested)

Fees to be estimated if such services are requested.

SECTION V

Prior Experience and Qualifications

PRIOR EXPERIENCE AND QUALIFICATIONS

Kane, McKenna and Associates, Inc.

Kane, McKenna and Associates, Inc. has a wide range of experience with area redevelopment plans in Illinois, as well as within communities located within the Chicago Metropolitan Area and throughout the State of Illinois. Assignments relating to determining and utilizing various public financing mechanisms, as well as related economic analysis have been undertaken on projects within Berwyn, La Grange, Des Plaines, Westchester, River Forest, Aurora and Naperville, as well as dozens of other suburban and downstate communities. A list of references is included in Section VI.

Business District Experience

Kane, McKenna has assisted in evaluating or designating Business Districts in the following communities:

- | | |
|--------------------|--------------------|
| - Addison | - Antioch |
| - Aurora | - Blue Island |
| - Bourbonnais | - Edwardsville |
| - Elgin | - Elmwood Park |
| - Lincolnwood | - Lindenhurst |
| - Lombard (2) | - Naperville |
| - New Lenox | - Niles |
| - River Forest (2) | - Riverside (3) |
| - Roselle | - Round Lake Beach |
| - Volo | - West Dundee |
| - Yorkville | |

Kane, McKenna has also examined other areas for potential BD designation and in some cases utilized alternative approaches (TIF, SSA, other) or determined that the area would not qualify.

Assignments included redevelopment of regional shipping centers (Niles, Lombard) or single project related uses (Edwardsville, Elgin, Yorkville), smaller neighborhood areas (Riverside, River Forest, Roselle) and larger area designations (Addison, Blue Island, Round Lake Beach).

SECTION VI

Resumes of Key Personnel

Philip R. McKenna, Chairman

Mr. McKenna was a founding partner of Kane, McKenna and Associates, Inc. in 1984 and has served as President and Chief Executive Officer of both Kane, McKenna and Associates, Inc. and its affiliate, Kane, McKenna Capital, Inc., since 1994. Previously, Mr. McKenna was first vice president and manager of public finance for Van Kampen Merritt Inc., a Naperville, Illinois based investment banking firm. In that role Mr. McKenna was responsible for a full range of tax-exempt financing transactions including General Obligation, Special Service Area, Municipal Revenue Bonds, College and University Revenue Bonds, Health Care Revenue Bonds, Pollution Control Revenue Bonds, and Industrial Revenue Bonds. He was previously the Deputy Head of the Public Finance Department of The First National Bank of Chicago.

Mr. McKenna's expertise encompasses many aspects of public finance and economic development, in particular: municipal general obligation and revenue bond financing; education; urban redevelopment; industrial and commercial development and redevelopment; housing finance; tax increment financing; and other public forms of incentive financing. Mr. McKenna has worked extensively with public officials responsible for municipal finance activities in several midwestern states. He has also served as an advisor to the Chicago Economic Development Commission, the United States Conference of Mayors, and associations of private colleges and universities.

Mr. McKenna currently serves on advisory and/or governing boards within and without the industry including: Illinois Tax Increment Association, Board and Legislative Advisory Committee; adjunct faculty for real estate finance. He has been a frequent speaker on a variety of municipal and development topics.

Mr. McKenna has served on numerous civic, community, and not-for-profit boards and committees, including: Board of Trustees, Saint Mary-of-the-Woods College, Indiana; various United Way monitoring committees; Board of Regional Economic Development Coordinating Council; Board of Directors, Hinsdale Little League; Board and founding member, Illinois Tax Increment Association.

Mr. McKenna has also written articles and/or delivered speeches to a number of organizations, including: Illinois GFOA; Chicago Metropolitan GFOA; Illinois Tax Increment Association; Federal Reserve Bank Forums; and Illinois and Indiana Legislative Committees.

A 1970 graduate of the University of Notre Dame, Mr. McKenna also received a Master of Business Administration degree from The University of Chicago in 1978.

Robert Rychlicki, President

Mr. Rychlicki has been with Kane, McKenna and Associates, Inc. (and its predecessor firm) since its inception. With over fifteen years of experience, he has structured financings for more than 120 developments and redevelopments in over 70 different communities.

Mr. Rychlicki's experience includes framing local government economic development efforts, including the formation of revolving loan funds, local economic development commissions, and business retention efforts. He has also facilitated the successful development of public/private partnerships, which have included various municipal, state, and federal programs utilized in conjunction with private sector financing (both equity and debt). Along those lines, Mr. Rychlicki has coordinated the creation of numerous tax increment financing districts and associated TIF bond issues, business districts, and sales tax sharing agreements.

Through the above experience, Mr. Rychlicki has developed an understanding of the economics of many types of developments, including industrial, commercial, retail, residential and hotel developments. Utilizing this knowledge, he has assisted in structuring arrangements so that market driven projects are successfully carried out within the framework of the project's parameters.

Mr. Rychlicki completed both his undergraduate and graduate work at the University of Illinois at Chicago, and earned a Master in Administrative Science, a program offered jointly by the business school and the public policy school.

DJ Fiore

Mr. Fiore joined Kane McKenna and Associates, Inc. in 2017. Since, he has assisted clients in numerous advisory services including Tax Increment Financing and Business District qualification, feasibility studies, and developer gap analyses.

Mr. Fiore has extensive experience in real property appraisal and market analysis. Prior to joining KMA, he developed valuation departments for two successful real estate start-ups; Roofstock, Inc. and LendingHome Funding Corporation.

Currently, Mr. Fiore is completing a Masters in Urban Planning and Policy from the University of Illinois at Chicago (UIC). He holds a Bachelor's of Science in Geography from Northern Illinois University (NIU) where his focus areas were economic geography and advanced spatial statistics.

SECTION VII

References

Kane, McKenna and Associates, Inc.
Economic Development Project References

- 1) Mr. Timothy Wiberg
Village Manager
Village of Brookfield
8820 Brookfield Avenue
Brookfield, Illinois 60513
Phone: 708/485-7344
- 2) Mr. Robert Pilipiszn
Village Manager
Village of LaGrange
53 South La Grange Road
La Grange, Illinois 60525
Phone: 708/579-2300
- 3) Mr. Eric Palm
Village Administrator
Village of River Forest
400 Park Avenue
River Forest, Illinois 60305-179
Phone: 708/366-8500 x320
- 4) Mr. Tim Gillian
Village Administrator
Village of Forest Park
517 Des Plaines Avenue
Forest Park, Illinois 60130-1801
Phone: 708/615-6201
- 5) Mr. Brian Pabst
Village Administrator
Village of Willowbrook
835 Midway Drive
Willowbrook, Illinois 60527
Phone: 630/920-2261
- 6) Mr. Paul Volpe
Village Manager
Village of Elmwood Park
11 Conti Parkway
Elmwood Park, Illinois 60707-4505
Phone: 708/452-3914



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VILLAGE OF BURR RIDGE, IL

REQUEST FOR PROPOSALS: CREATION OF BUSINESS DEVELOPMENT DISTRICT (BDD) FEASIBILITY STUDY AND DISTRICT PLAN

DEADLINE: OCTOBER 2, 2020 | 2:00 PM CT

Village of Burr Ridge, IL

RFP: CREATION OF BUSINESS DEVELOPMENT DISTRICT (BDD) FEASIBILITY STUDY AND DISTRICT PLAN WITHIN DOWNTOWN BURR RIDGE

- 1 COVER LETTER**
- 2 STATEMENT OF PROJECT UNDERSTANDING**
- 3 SCOPE OF SERVICES AND TIMELINE**
- 4 COST PROPOSAL**
- 5 FIRM PROFILE**
- 6 KEY PERSONNEL**
- 7 REFERENCES AND RELATED EXPERIENCE**
- 8 FINANCIAL STABILITY AND INSURANCE**

SB FRIEDMAN DEVELOPMENT ADVISORS

221 North LaSalle Street, Suite 820
Chicago, IL 60601-1317
T: (312) 424-4250
E: info@sbfriedman.com

sbfriedman.com



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October 2, 2020

Evan Walter
Assistant Village Manager
Village of Burr Ridge
7660 County Line Road
Burr Ridge, Illinois 60527

RE: Request for Proposals – Creation of Business Development District (BDD) Feasibility Study and District Plan Within Downtown Burr Ridge

Dear Mr. Walter:

SB Friedman Development Advisors ("SB Friedman") is pleased to present this proposal to the Village of Burr Ridge (the "Village") to provide consulting services related to the creation of a Business District (BD) to support the revitalization of downtown Burr Ridge.

Our firm has deep experience in all aspects of special district creation/eligibility analysis, including Business District designation. We have provided communities with feasibility analyses, visioning, public outreach, financial analysis, boundary definition and other technical aspects of establishing and amending various special taxing/incentive districts. Our approach to this assignment includes working closely with Village staff to determine the eligibility of the study area to be designated as a Business District and analyzing the relative revenue potential of the area. Based on our findings, we will then recommend designation and assist the Village.

Founded in 1990, SB Friedman is a real estate and development advisory firm in its 30th year of business. We have substantial and notable experience with assisting public sector clients in the designation and support of special districts; we have not only led the establishment/amendment of over 90 special districts, including business districts, tax increment financing districts and special service areas, but have also provided over 200 evaluations of proposed TIF transactions/requests to more than 100 clients.

Additionally, our firm has deep experience in providing comprehensive development advisory services for public bodies, including market studies, redevelopment strategies, economic and fiscal impact analyses, financial projections, developer solicitation and RFP/Q evaluation, financial structuring of public-private partnerships, and negotiation assistance.

SB Friedman supported the Village of Burr Ridge when the Town Center project was proposed in 2005 and we look forward the opportunity to work with the Village again. Please do not hesitate to contact us with any questions.

Sincerely,

A handwritten signature in blue ink, appearing to read "Geoff Dickinson".

Geoffrey Dickinson, AICP
Senior Vice President
(312) 384-2404, gdickinson@sbfriedman.com

A handwritten signature in blue ink, appearing to read "Caitlin Johnson".

Caitlin Johnson, AICP
Project Manager
(312) 384-2403, cjohnson@sbfriedman.com

2. STATEMENT OF PROJECT UNDERSTANDING

BACKGROUND AND APPROACH

Burr Ridge Village Center's strategic location off I-55 has fostered its position as a prime commercial location in the western suburbs. This area has experienced significant development activity over the past 15 years, including retail and office projects associated with the County Line Square and Village Center. However, in recent years, the area has struggled to attract the new commercial development desired by the Village. Additionally, the global COVID-19 pandemic has significantly impacted tax returns as many businesses remain closed, or operating at partial capacity. To unlock unrealized development potential and support local businesses, the Village is exploring options for public financial assistance.

It is our understanding that the Village is considering utilizing Business District (BD) financing to support revitalization and public infrastructure investment in the area surrounding the Burr Ridge Village Center (Study Area). The Village seeks to understand the eligibility of and the optimal boundary for the potential BD, as well as the potential sales tax revenue that the district could generate if designated as a BD. The proposed Study Area comprises approximately 36 parcels, as shown on the following map:

Map 1. Proposed BD Study Area



Under this proposed scope of services, SB Friedman will work with Village staff to determine the eligibility and revenue potential of the Study Area. We have organized our proposed scope of services into three primary tasks:

- 1. Conduct BD Eligibility Analysis.** We will begin the engagement by completing a BD Eligibility Study for the Study Area. We will document the eligibility criteria by parcel. As we confirm and document eligibility findings required by the BD Act, we will work with Village staff to identify and finalize the optimal BD boundary.
- 2. Prepare BD Sales and Hotel Tax Projections and Briefing Book.** Following confirmation of an optimal BD boundary, we will work with the Village to prepare BD sales and hotel tax projections from existing stores and businesses. The projections will be provided annually for the life of the BD. To summarize our findings, we will prepare a briefing book documenting the eligibility findings, projections and potential revenue associated with the Study Area, as well as recommendations regarding the boundary that appears to best meet eligibility and the objectives of the Village.
- 3. Prepare BD Plan and Conduct Public Approval Process for One Business District.** We will prepare the formal Redevelopment Plan and Project document required under the BD Act and work with the Village and the Village's legal counsel to conduct the public approval process required for establishment of a Business District.

A detailed scope of service and budget for each of these tasks is provided in the following sections.

SCOPE OF SERVICES

TASK 1: CONDUCT BD ELIGIBILITY ANALYSIS

1. Conduct Project Kickoff Call

We will conduct a call with the Village to:

- » Discuss the project scope and timeframe;
- » Confirm the initial boundary of the Study Area and fieldwork approach;
- » Review any existing documents compiled by the Village; and
- » Identify additional key sources of data that we will need for our analysis.

2. Obtain and Review Background Data

We will pursue key data to determine whether the Study Area qualifies for BD designation, based on the criteria outlined in the BD Act. In order to complete our eligibility study for each Study Area, we will:

- » Obtain current GIS parcel shape files and/or existing base maps from the Village;
- » Prepare internal base maps;
- » Confirm current municipal boundaries and whether parcels anticipated to be included in BD are annexed into Village;
- » Obtain and review five-year history of building permit data for parcels within the Study Area;
- » Obtain information about properties in the Study Area through interviews, as appropriate;
- » Obtain any traffic studies and roadway capital improvement plans;
- » Prepare PIN list;
- » Obtain six-year history of equalized assessed values (EAV) for the Study Area and Village from Cook and DuPage Counties; and
- » Enter, proof and map eligibility criteria, as required.

3. Conduct Field Research

We will conduct field research in the Study Area and, generally, the surrounding context of the Study Area, to document field-observable eligibility factors. Our budget estimate assumes one day of field work for approximately 36 parcels.

4. Conduct Analyses for Required Findings and Tests

To test eligibility, we will analyze the growth in EAV over the past six years (five year-to-year periods) and compare EAV growth in the Study Area to growth in the Village EAV overall and the Consumer Price Index over those periods. We will conduct additional analyses of data from the Village and our field research to determine whether the Study Area meets other required findings and tests outlined in the BD Act, which include:

- » Lack of growth and private investment;
- » "But for" analysis;
- » Conformance to the plans of the Village; and
- » Contiguity of parcels and benefit from BD designation.

5. Analyze Eligibility and Potential Boundary

Based on our field research and other data, we will analyze eligibility of the Study Area and determine the optimal boundary. The eligibility findings and boundary will be documented in a series of maps for each Study Area.

6. Conduct Call with Village to Discuss Findings and Boundary

We will conduct a call with the Village to discuss our findings and recommendations and to finalize the BD boundary.

TASK 2: PREPARE REVENUE PROJECTIONS AND BRIEFING BOOK

7. Project BD Sales and Hotel Tax Revenue for the Study Area

Using the preferred BD boundary determined through the eligibility analysis, we will prepare BD sales tax revenue projections.

- » BD sales tax revenue projections. We anticipate collecting any available information from the Village regarding recent sales tax revenue for existing businesses in the proposed BD for the last five years. We have assumed that the Village will provide the development program and anticipated tenants for any proposed or under-construction sales tax generating projects within the Study Area. Our projections will account for those proposed or under-construction projects identified by the Village. Using that data, industry sources, research of potential ongoing impacts to retail from COVID-19, and our experience with retail analysis, we will estimate potential sales within the potential BD and project sales tax revenue under alternate scenarios (e.g., imposition of a 0.25%, 0.5%, 0.75% or 1.0% BD sales tax rate).
- » BD hotel tax revenue projections. There is currently a hotel located within the proposed BD Study Area. Using data on hotel sales tax from the Village, average daily rate data, industry sources on the potential impact of COVID-19 on the hotel industry, and data on proposed hotel developments (if any), we will estimate potential hotel sales tax for the potential BD and project hotel sales tax revenue under alternate scenarios (e.g., imposition of a 0.25%, 0.5%, 0.75% or 1.0% BD sales tax rate).

8. Prepare Draft Briefing Book

We will prepare a Briefing Book to document our eligibility findings, revenue projections and recommendations regarding the potential BD. This Briefing Book will be similar in format to an annotated presentation and will not be a formal report. The Briefing Book will provide sufficient information for the Village to decide whether to proceed with BD designation.

9. Discuss with Village Staff and Finalize Briefing Book

We will hold a conference call to discuss the draft Briefing Book with Village staff. We will make one round of revisions to the document based on consolidated feedback from the Village and issue a final deliverable.

TASK 3: PREPARE BD PLAN AND CONDUCT PUBLIC APPROVAL PROCESS FOR ONE BD

This task assumes that the Study Area will have been found to meet eligibility criteria for designation as a Business District in Task 1. If, at this point, it appears unlikely that a Business District can be established, we will discuss options regarding potential alternative approaches going forward and will stop work until a clear path can be defined, working jointly with the Village.

10. Prepare Draft Eligibility Study and Plan Document

We will draft a formal Eligibility Study, as well as the Redevelopment Plan and Project for the proposed BD. As required by the Act, the document will include:

- » District boundary, including a map;
- » Eligibility analysis;
- » Required findings and tests, including the “but for” test;
- » General description of proposed projects;
- » Location of proposed projects;

-
- » District name;
 - » Estimated project costs;
 - » Anticipated sources of funds to pay project costs;
 - » Anticipated type and term of obligations to be issued; and
 - » Tax rate(s) to be imposed.

Preliminary projections of Business District taxes will be included for the purpose of confirming the supportable budget for the district, as required by the Act. A series of maps of the proposed Business District will be prepared for inclusion in the plan. These maps will include: community context, proposed boundary, and the documentation of eligibility factors.

11. Obtain and Proof Boundary Legal Description

Based on the Village's preference, we will either directly engage and manage a licensed surveyor, or coordinate with the Village, who may elect to work directly with a licensed surveyor, to obtain a boundary legal description for the BD. Once the boundary description has been prepared, we will proof the text to ensure its accuracy prior to inclusion in the Plan.

12. Prepare Business Address List for Submittal to IDOR

Using data collected from the Village and validated during our fieldwork, we will prepare a list of sales and/or hotel tax generating businesses within the BD boundary for submittal to the Illinois Department of Revenue ("IDOR"). Our budget assumes the Village will work with IDOR after submittal to refine the list as needed.

13. Finalize Business District Plan

We will submit the draft plan to the Village and the Village's legal counsel for review. We will conduct a call to discuss edits and incorporate one round of revisions. We will then finalize the plan and send to the Village for filing with the Village Clerk.

14. Complete Public Approval Process

The Village will be required to provide public notice per the Act. We will work with the Village's legal counsel to ensure appropriate noticing, though the Village and legal counsel will be responsible for preparing and publishing required notices. We will attend and present at one virtual Public Hearing/Village Approval meeting.

TIMEFRAME

We will work closely with the Village to meet any specific deadlines for the analyses, where possible. On the basis of the scope of the work outlined herein and our experience with similar projects, we estimate it will take approximately 60 to 75 days to complete Tasks 1 and 2. The precise timing will depend in part on the length of time it takes for the Village, Cook County and other potential data sources to provide key data for our analyses. We will work with the Village to determine the timing of Task 3, which would occur following the completion of Task 2.

COST PROPOSAL

Professional fees for our services will be based on time required at the then-current billing rates of the assigned SB Friedman personnel. The scope of the engagement and our experience with similar services indicate that our professional fees and expenses will not exceed **\$19,970**, as shown below and in the detailed budget estimate table.

Task 1: Conduct BD Eligibility Analysis	\$ 8,260
Task 2: Prepare Revenue Projections and Briefing Book	4,805
Task 3: Prepare BD Plan and Conduct Public Approval Process	6,405
Reimbursable Expenses	500
TOTAL SB FRIEDMAN FEES AND EXPENSES	\$ 19,970

The above fee estimate is based upon the work steps described in the Scope of Services, and the time budgets shown in the detailed budget estimate. This fee proposal contemplates our attendance at the following virtual meeting:

- » One Public Hearing for Business District designation

The fee estimate has been prepared based on certain assumptions as to the time required and the amount of data available from the Village. The fee estimate is subject to upward revision if the engagement entails more time than estimated due to problems that are encountered which could not reasonably have been foreseen at the commencement of the engagement, or if the scope is changed. In this event, we will discuss the matter with you so that a mutually agreeable revision may be made. Fees and expenses for our services will not exceed the total budget estimate without further authorization from the Village.

DETAILED BUDGET ESTIMATE

TASK STEP			Senior Vice President	Project Manager	Associate
		TOTAL BD	\$255	\$225	\$160
TASK 1: CONDUCT BD ELIGIBILITY ANALYSES					
1	Conduct Project Kickoff Call	\$800	1	1	2
2	Obtain and Review Background Data	\$865	0	1	4
3	Conduct Field Research	\$2,785	0	1	16
4	Conduct Analyses for Required Findings and Tests	\$1,665	1	2	6
5	Analyze Eligibility and Boundary for Study Area	\$1,345	1	2	4
6	Conduct Call with Village to Discuss Findings and Boundary	\$800	1	1	2
Task 1: Subtotal Professional Fees		\$8,260	4	8	34
TASK 2: PREPARE REVENUE PROJECTIONS AND BRIEFING BOOK					
7	Project BD Tax Revenue for Study Area	\$1,665	1	2	6
8	Prepare Draft Briefing Book	\$1,795	1	4	4
9	Discuss with Village Staff and Finalize Briefing Book	\$1,345	1	2	4
Task 2: Subtotal Professional Fees		\$4,805	3	8	14
TASK 3: PREPARE BD PLAN AND CONDUCT PUBLIC APPROVAL PROCESS FOR ONE BD					
10	Prepare Draft BD Eligibility Study and Plan Document	\$2,435	1	4	8
11	Obtain and Proof BD Boundary Legal Description	\$545	0	1	2
12	Prepare BD Business Address List for Submittal to IDOR	\$1,120	1	1	4
13	Finalize Business District Plan	\$1,025	1	2	2
14	Complete Public Approval Process	\$1,280	2	2	2
Task 3: Subtotal Professional Fees		\$6,405	5	10	18
Total Hours		104	12	26	66
Total Professional Fees		\$19,470	\$3,060	\$5,850	\$10,560
Plus Reimbursable Travel and Expenses		\$500			
Boundary Legal Description		Not included			
Mailing and Noticing Costs		Not included			
TOTAL ESTIMATED BUDGET		\$19,970			

Please note that this fee proposal does not include expenses or allowances for third-party costs, such as:

- » The boundary legal description for the BD, which will need to be performed by a licensed surveyor. Typically, fees for a boundary legal description range from \$2,000 to \$4,000;
- » Legal costs; and
- » Costs of noticing and publication of meetings.

Actual billings will be based on time expended at the Special District Designation Project Hourly Rates, currently as follows:

Senior Vice President	\$255
Vice President	\$225
Associate Project Manager	\$190
Associate	\$160
Research Associate	\$140
Editor	\$115

These rates will be in effect until December 31, 2020 except in the case of promotions of individuals. After this date, rates are subject to adjustment.

Travel, publications, maps, telephone toll charges, photocopies, report reproduction, color reproduction, faxes, messenger and express services, data purchased specifically for this project, use of company-owned or -licensed data bases, and other out-of-pocket expenses will be billed as incurred without mark up. Travel time in excess of normal commuting time at the beginning or end of the day will be billed. Travel time during business hours will be billed in full.

Additional meeting time and additional services, beyond what has been included in the budget, will be billed at then-current billing rates.

Invoices will be rendered monthly as our work progresses for services and costs incurred. Invoices are payable within 30 days.

If at any point the decision is made to discontinue our services, our fee will be based upon the actual time expended and out-of-pocket costs incurred to that date.

FIRM OVERVIEW

Founded in 1990, SB Friedman Development Advisors (“SB Friedman”) provides analytical, strategic and financial consulting services in support of complex, high-impact development projects. ***Our mission is to guide and enable our clients to create high-quality places through the practice of real estate economics, development finance and urban planning.***

SB Friedman is noted for: our rigorous “but for” analyses, underwriting and structuring of successful public-private financing partnerships to facilitate high-quality redevelopment projects; our breadth of knowledge in tax increment financing, tax abatements, tax credits, bonds and other related “gap financing” tools; and our related capabilities in market analysis, fiscal and economic impact analysis, and developer evaluation and solicitation.

Our firm has reviewed the feasibility of hundreds of development projects throughout the country. We are currently providing these services for the following clients under term agreements: City of Chicago (IL), City of Milwaukee (WI), District of Columbia (DC), Economic Development Corporation of Kansas City (MO), Michigan Economic Development Corporation (MI), and the Commonwealth of Kentucky (KY). We have also completed reviews of major projects in Boise, Cincinnati and Dallas.

OVER THE PAST 12 YEARS, SB FRIEDMAN HAS SERVED AS ANALYST AND ADVISOR FOR \$4.7 BILLION OF PUBLIC-PRIVATE FINANCING IN SUPPORT OF \$27.1 BILLION OF PROJECTS.

Core Services

- » Business Districts and tax increment financing (TIF) districts, as well as other special taxing districts
- » Gap financing and “but for” underwriting
- » Public-private partnership structuring and negotiation support
- » Real estate financial feasibility
- » Market analysis
- » Development strategy and planning
- » Developer recruitment and selection
- » Fiscal and economic impact analysis
- » New Markets Tax Credits (NMTC)
- » Value capture and infrastructure finance
- » Housing needs analysis and affordability strategies
- » Economic development and policy studies

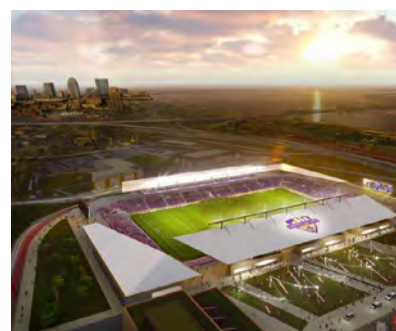
Images (from top to bottom):

Corporate Campus Redevelopment Strategy & Developer Solicitation, Omaha, NE
The Fowler Financial Deal Review, Boise, ID

Butchertown Stadium District Feasibility Study, Louisville, KY

Manpower World Headquarters Economic Feasibility Analysis, Milwaukee, WI

Lincoln Yards Underwriting Analysis & Deal Structuring, Chicago, IL



BUSINESS DISTRICT AND OTHER SPECIAL DISTRICT ADVISORY SERVICES

SB Friedman has expertise in providing communities with feasibility analyses, visioning, public outreach, financial analysis, boundary definition and other technical aspects of establishing and amending various special taxing/incentive districts. We have assisted with the development of these districts in a variety of environments, including big city commercial corridors, urban industrial areas, and downtowns in suburban and smaller communities. In particular, we have led the establishment and use of Business Districts to support commercial development and redevelopment. Services including the following:

Eligibility Studies. The firm has led the establishment of over 90 special districts, including numerous Business Districts in multiple states under multiple statutes.

Revenue Projections for Sales and Hotel Taxes. We have prepared revenue projections for numerous districts and projects covering residential, retail, office, research, industrial, hotel, parking, sports facility and other land uses. We have particular expertise in projecting sales tax and hotel tax revenue under alternate tax rate scenarios.

Preparation of Business District Plans and Public Approval Support. We have experience drafting formal eligibility studies as well as other components of the full Business District Plan document, and have led municipalities through the public approval process.

Partnership Negotiation Support/Term Sheet Development. The main goal in negotiating a public-private partnership is to strike a business agreement that is clear, fair and complete. Often, these agreements are initially summarized in a term sheet that serves as the backbone of the final contract between the municipality and applicant. SB Friedman has assisted public sector clients in crafting term sheets as part of redevelopment agreements.

THOUGHT LEADERS IN PUBLIC-PRIVATE DEVELOPMENT FINANCE

SB Friedman is active in the Council of Development Finance Agencies (CDFA), a national association for the advancement of development finance concerns and interests. Several senior personnel have served or currently serve as national tax increment financing (TIF) curriculum advisors and/or instructors for various programs. We also served as lead editor of its "Advanced Tax Increment Finance Reference Guide." We are also involved in other local and national organizations like the Urban Land Institute focused on public private partnerships. We have served on the board of the Illinois Tax Increment Association (ITIA) for over a decade.

KEY PERSONNEL

The following key individuals are committed to this project. Detailed resumes summarizing background and experience for each key team member follow.

Geoff Dickinson, AICP, Senior Vice President. Geoff is a real estate and economic development advisor with expertise in public-private development finance, financial gap analysis, and special district eligibility studies and establishment. He has advised numerous municipalities throughout Illinois, as well as in Idaho and Kentucky, on matters related to Business District designation and tax increment financing (TIF) districts. He has helped the Villages of Roselle, Glenview, and Grayslake establish Business Districts. He has also evaluated developer tax projections for a redevelopment project in Burr Ridge, Illinois. Geoff is registered with the MSRB as a Series-50 Qualified Municipal Advisor Representative.

Projected number of hours: 12 / Hourly rate: \$255

Caitlin Johnson, AICP, Project Manager. Caitlin brings a background in community and economic development, public-private development finance, and urban planning. She specializes in market analysis and redevelopment strategy as well as special district eligibility studies/designation. Her experience at SB Friedman includes TIF/Business District designations and reporting for the Cities of Chicago and Milwaukee, and numerous municipalities in Illinois. She has also conducted numerous market analyses and provided redevelopment strategies as part of broader planning efforts across the country.

Projected number of hours: 26 / Hourly rate: \$225



GEOFFREY DICKINSON, AICP

SENIOR VICE PRESIDENT

Geoff is a real estate and economic development advisor with expertise in public-private development finance, financial gap analysis, and special district eligibility studies and establishment. He has advised numerous municipalities throughout Illinois, as well as in Idaho and Kentucky, on matters related to Business District designation and tax increment financing (TIF) districts. He has helped the Villages of Roselle, Glenview, and Grayslake establish Business Districts. He has also evaluated developer tax projections for a redevelopment project in Burr Ridge, Illinois. Geoff is registered with the MSRB as a Series-50 Qualified Municipal Advisor Representative.

EDUCATION

Master of Urban Planning, University of Michigan, 2004

Bachelor of Arts Degree in History, Northwestern University, 1993

PROFESSIONAL/CIVIC ORGANIZATIONS

American Planning Association /American Institute of Certified Planners (AICP)

Illinois Tax Increment Association (ITIA) (Board Member)

Lambda Alpha International- Ely Chapter (Board Member)

SELECT PUBLICATIONS

2017, "Constructing Effective Public-Private Partnerships" (with L. Dorn), American Planning Association PAS Memo

2016, "Reviewing a Deal: Finding the Right Size and Structure" (with L. Dorn), ILCMA Newsletter

2014, "(Re-)Development Strategy: The Bridge from Goals to Implementation" (with S. Friedman and F. Lefor Rood), ILCMA Newsletter

2013, "What's Next?" (with S. Friedman), ILCMA Newsletter

SELECT PRESENTATIONS

"Public-Private Partnerships: Best Practices for a Successful Deal" (CDFA, 2019)

"TIF Legal & Procedural Nuts & Bolts" (CDFA TIF Webcourse, 2019)

"Public-Private Partnerships and Economic Development Tools" (Chicago Bar Association, 2018)

"Beyond TIF: Economic Development Tools and Strategies" (ILCMA Metro Luncheon, 2017)

"Reinventing Resource-Rich Midwestern Cities" (APA National Conference, 2016)

PROJECT EXPERIENCE

Business District Designations • Various Locations

- » Managed an eligibility study and designation for the Chestnut/Waukegan Business District for the Village of Glenview, Illinois
- » Managed an eligibility study and designation for the Gary Avenue Business District for the Village of Roselle, Illinois

TIF District Consulting Services • Various Locations

- » Provided eligibility studies for and designated the Thorndale and Wood Dale Road TIFs in Wood Dale, Illinois
- » Provided an eligibility study for and designated the Deerfield Road TIF in Riverwoods, Illinois
- » Provided an eligibility study and designation services to the City of Fulton for the IL84 and 31st Avenue TIF
- » Provided an eligibility study and designation services to the City of Warrenville, Illinois, for the Old Town/Civic Center TIF
- » Provided eligibility studies and designation services to the Village of Cordova for three TIF districts
- » Provided TIF services, development advisory services and financial deal reviews to the City of Joliet, with a focus on revitalizing the City's downtown district and neighborhoods around hospitals
- » Managed preparation of a TIF amendment for the Gateway TIF in Lemont, Illinois
- » Managed preparation of a TIF amendment for Joliet City Center TIF in Joliet, IL
- » Managed preparation of a TIF amendment for the Village Center TIF in Hanover Park, Illinois

Special Service Area Establishments/ Reconstitutions • Various Locations

- » Provided financial modeling services to establish Special Service Area (SSA) 43 on Devon Street in Chicago, Illinois
- » Managed reconstitution support services for SSA 47 in the Bronzeville neighborhood of Chicago, Illinois
- » Managed reconstitution support services for SSA 31 in the Ravenswood neighborhood of Chicago, Illinois
- » Managed reconstitution support services for SSA 34 in the Uptown neighborhood of Chicago, Illinois
- » Supported decision-making for a proposed Economic Improvement District in Indianapolis, Indiana

Public-Private Development Finance • Various Locations

- » Assisted the Village of Burr Ridge in reviewing a developer's tax projections for a proposed development



CAITLIN JOHNSON, AICP

PROJECT MANAGER

Caitlin brings a background in community and economic development, public-private development finance, and urban planning. She specializes in market analysis and redevelopment strategy as well as special district eligibility studies/designation. Her experience at SB Friedman includes TIF/Business District designations and reporting for the Cities of Chicago and Milwaukee, and numerous municipalities in Illinois. She has also conducted numerous market analyses and provided redevelopment strategies as part of broader planning efforts across the country.

EDUCATION

Master of Science in City Design and Social Science, London School of Economics

Master of Business and Master of Arts in Community Development and Planning, Clark University

Bachelor of Arts in Economics, Wheaton College (MA)

PROFESSIONAL/CIVIC ORGANIZATIONS

American Planning Association/American Institute of Certified Planners (AICP)

SELECT PUBLICATIONS

"Exchange Publics" (with Ibrahim, D., Martin Sainz de los Terreros, J., and M. Morel), Public City, MSc City Design and Social Science Studio Publication 2011-2012 (pp. 114-135). London, UK: The Cities Programme, The London School of Economics and Political Science.

"Retail Metamorphosis: Planning for Retail Space in a Post-Pandemic Era" (ILCMA Newsletter, October 2020)

SELECT PRESENTATIONS

"The Changing Retail Real Estate Landscape" (ITIA Fall Conference, 2018)

"E-Commerce and Vibrant Communities: Planning for Retail and Industrial Development" (Chicago Metro Section, APA IL, June 2018)

"The Red Zone: Right-Sizing Retail for Comprehensive Planning" (Speed Planning Session, APA IL Conference, 2017)

PROJECT EXPERIENCE

Business District Designations • Various Locations, Illinois

- » Determined eligibility for/designated four business districts and two TIF districts in La Grange Park
- » Determined eligibility for/designated two business districts in Fox Lake
- » Prepared two Business District (BD) eligibility studies, and a BD amendment for the Village of Antioch

TIF District Consulting Services • Various Locations, Illinois

- » Prepared a TIF eligibility study for the Route 83 TIF in the Village of Antioch
- » Prepared a TIF eligibility study for/designated the Roselle Road-Nerge TIF in the Village of Roselle
- » Prepared a TIF eligibility study for/designated the Downtown TOD TIF in the Village of Homewood
- » Prepared a TIF eligibility study for/designated the Presence Saint Joseph Medical Center TIF in the City of Joliet
- » Prepared a TIF amendment for the Gateway TIF in Lemont
- » Prepared a TIF amendment for the Barrington-Higgins TIF in Hoffman Estates
- » Prepared a TIF amendment for the Spring Hill Center for Commerce and Industry TIF in Carpentersville
- » Prepared a TIF amendment for Joliet City Center in Joliet
- » Analyzed TIF district project data, redevelopment agreements and financial reports to compile Five-Year Strategic Review Reports for the City of Chicago
- » Analyzed the return on public investment and additional community, economic and fiscal impacts of three TIF districts located within the Village of Oak Park

Public-Private Development Finance • Various Locations

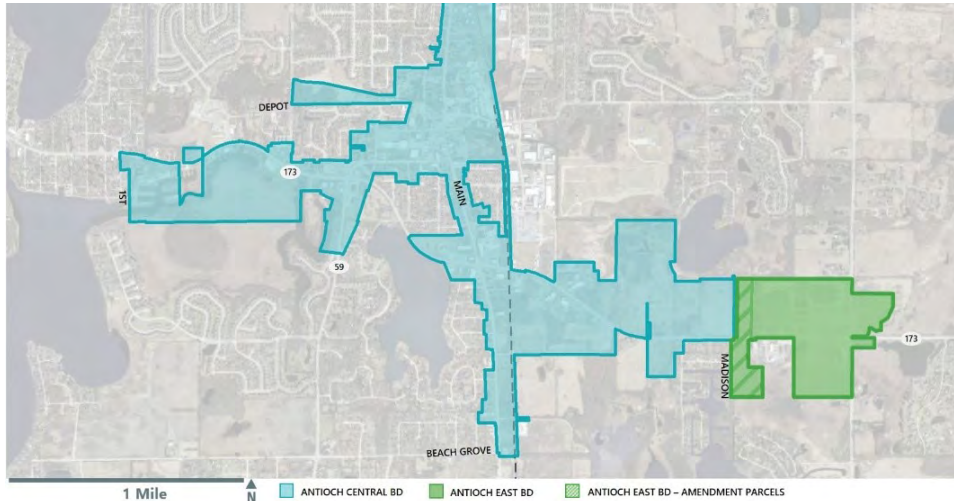
- » Reviewed financial gap and deal structure for a project requesting general obligation and TIF assistance; project involved the development of a market-rate multifamily apartment building in the City of West Allis, Wisconsin
- » Reviewed a request for assistance from an auto dealership to expand their facilities for the City of Joliet, Illinois by analyzing public and private costs
- » Reviewed a developer's request for TIF assistance, including preparing incremental property tax projections and evaluating revenues and returns for Geneva, Illinois

Market Analysis and Development Strategy • Various Locations

- » Managed a real estate market assessment for multifamily residential, retail, industrial and office uses within the City of Waukegan in order to guide future planning and development efforts citywide

7. REFERENCES AND RELATED EXPERIENCE

TIF AND BUSINESS DISTRICT ADVISORY SERVICES VILLAGE OF ANTIOCH, IL



LOCATION

Antioch, IL

REFERENCE

Mr. Michael Garrigan, Esq,
AICP, CNU-A
Director of Community
Development
Village of Antioch
(847) 395-1000 x 311
mgarrigan@antioch.il.gov

As part of the Village of Antioch's efforts to spur new development within key commercial areas and greenfield sites, the Village engaged SB Friedman to complete tax increment financing (TIF) and Business District (BD) eligibility analyses and designate the potential districts.

In 2017, the Village sought to designate an area of primarily Village-owned land (along West Grimm Road, between Illinois Route 83 and Illinois Route 173) as a potential TIF district. SB Friedman conducted a TIF Eligibility Study and prepared a Redevelopment Plan and Project to support the development of vacant land in this area as a mix of light industrial and commercial space. Upon approval, the Village elected to amend the TIF district to include two additional improved parcels and again engaged our firm to lead that process. In 2018 and 2019, SB Friedman assisted the Village with evaluating the feasibility of designating Business Districts (BDs) to fund infrastructure improvements and attract development within the primary commercial corridors in the Village.

Our key work steps included:

- » Evaluating the ability of each commercial district to meet the eligibility factors and required tests outlined in the Illinois TIF Act and BD Act;
- » Identifying optimal boundaries for the potential TIF district and Business Districts;
- » Preparing estimates of TIF and BD revenue generation; and
- » Advising Village staff on potential implementation strategies.

Results: The Village approved the TIF district in May 2018 and approved the amendment in December 2018. The Village also approved its first Business District, the Antioch BD, in March 2019. Since adoption, a new Tractor Supply Company has located within the TIF district. In March 2020, the Antioch Central BD was adopted. The Antioch BD was amended to include three additional parcels and renamed as the Antioch East BD, also in March 2020. Both business districts are anticipated to support new commercial development.

TIF AND BUSINESS DISTRICT ADVISORY SERVICES

VILLAGE OF LA GRANGE PARK, IL



LOCATION

La Grange Park, IL

REFERENCE

Ms. Julia Cedillo
Village Manager
Village of La Grange Park
(708) 354-0225
jcedillo@lagrangepark.org

SB Friedman assisted the Village of La Grange Park in initiating its commercial district revitalization efforts by designating the first TIF and BD's in the history of the Village.

The Village of La Grange Park is a historic bedroom community that has not seen new commercial development in many years. Seeking to expand its tax and employment base and capitalize on the significant redevelopment activity occurring in nearby downtown La Grange, Village officials wanted to evaluate the feasibility of designating Tax Incremental Financing (TIF) districts and Business Districts (BDs) to attract development. It would be the first time the Village explored designating these special districts.

Our preliminary work included:

- » Evaluating the ability of each commercial district to meet the eligibility factors and required tests outlined in the Illinois TIF Act;
- » Identifying optimal boundaries for the potential districts;
- » Preparing estimates of TIF and BD revenue generation; and
- » Advising Village staff on potential implementation strategies.

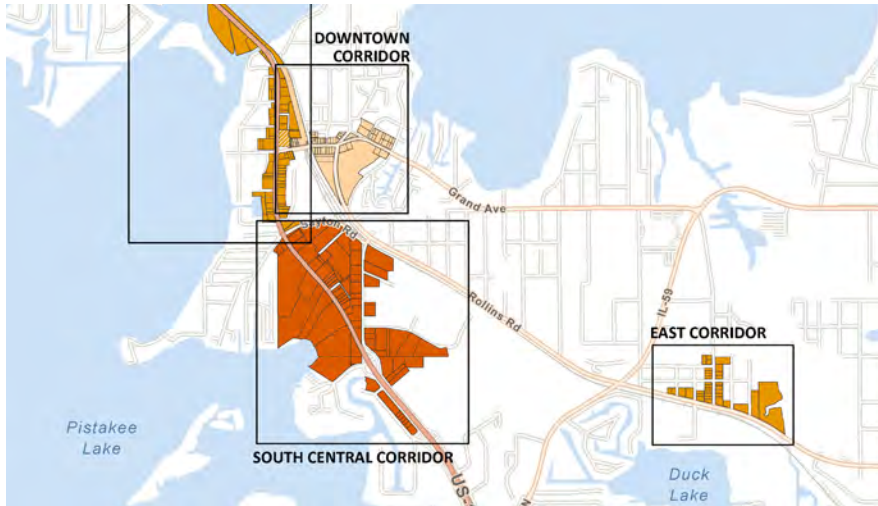
We were later engaged to assist the Village with implementation by:

- » Preparing formal TIF and BD eligibility studies and Redevelopment Project Area (RPA) Plan and Project documents;
- » Assisting with required public noticing; and
- » Leading the Village through the public approval process.

Results: The Village Board approved two TIF districts and four Business Districts in early 2017 and is currently marketing the availability of TIF and BD financing to developers and property owners whose redevelopment plans align with Village objectives.

BUSINESS DISTRICT ELIGIBILITY STUDY, PLAN AND DESIGNATION SUPPORT

VILLAGE OF FOX LAKE, IL



LOCATION

Fox Lake, IL

REFERENCE

Ms. Anne Marrin
Village Administrator
Village of Fox Lake
(847) 587-3942
marrina@foxlake.org

In order to spur redevelopment and improve public infrastructure in several commercial corridors, the Village of Fox Lake sought to explore the potential of designating one or more BD's.

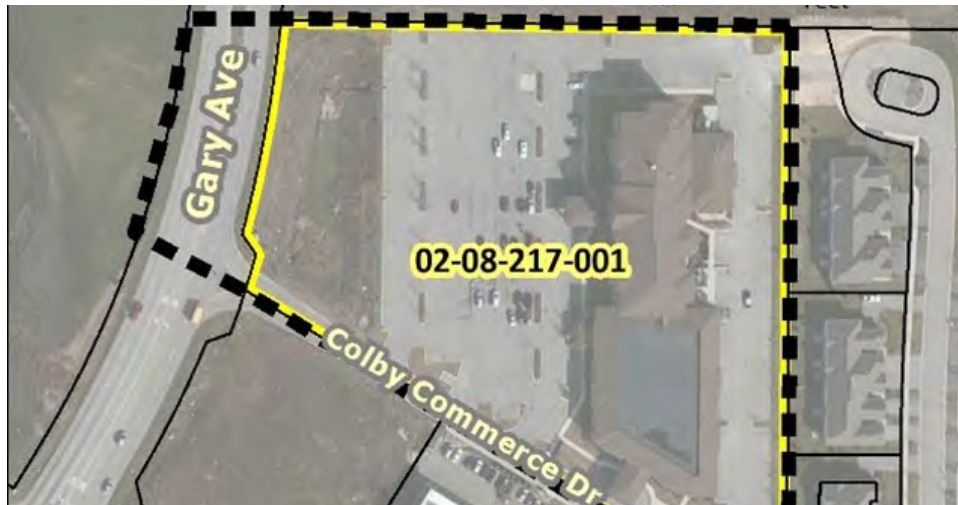
The Village engaged SB Friedman to evaluate Business District (BD) eligibility and to project potential revenue in five study areas. We found that three of the areas qualified for designation as a BD based on the presence of deterioration and obsolete platting, which were affecting the economic potential of each area.

Following our presentation of findings, the Village Board decided to proceed with designation of two BDs. SB Friedman prepared formal eligibility studies, drafted redevelopment plans, and assisted the Village in conducting the public approval processes required under state law.

Results: The Village Board approved the Central and South Business Districts in September 2017.

BUSINESS DISTRICT ELIGIBILITY STUDY, PLAN AND DESIGNATION SUPPORT

VILLAGE OF ROSELLE, IL



LOCATION

Roselle, IL

REFERENCE

Mr. Pat Watkins
(Former Community
Development Director,
Village of Roselle)
(224) 415-2743
watkinsnine@msn.com

The Village of Roselle identified certain conditions along Gary Avenue and Colby Commerce Drive that they believed inhibited economic development in that part of the Village. They sought to explore the potential for designating the area as a Business District under Illinois law in order to generate a source of funds to ameliorate those conditions.

In October of 2013, SB Friedman was engaged to conduct a Business District eligibility study for the study area. We gathered background data, including building permits, traffic studies, the Village Comprehensive Plan, and other relevant documents. We also conducted field research and data analysis to determine whether the study area met eligibility criteria of the Business District law.

After determining the area's eligibility, we completed a Redevelopment Plan for the Gary Avenue Business District, and worked with Village staff and the property owner to develop a budget for the Redevelopment Project. In addition, we assisted the Village and their legal counsel with noticing and other public process aspects of the designation.

Results: The Village of Roselle adopted the Gary Avenue Business District in March of 2014. The Village and the hotel owner entered into a redevelopment agreement to use BD taxes to help fund the buildout of the attached banquet space and the owner subsequently made that investment.

BUSINESS DISTRICT ELIGIBILITY STUDY, PLAN AND DESIGNATION SUPPORT

VILLAGE OF GLENVIEW, IL



LOCATION

Glenview, IL

REFERENCE

Ms. Ellen Dean
(Former Economic
Development Manager,
Village of Glenview)
Economic Development
Director
Village of Gurnee
(847) 599-7574
edean@village.gurnee.il.us

The Village of Glenview identified certain conditions along Waukegan Road which they believed inhibited economic development and endangered public health and safety in that part of the Village. They sought to explore the potential for designating the area a Business District under Illinois law in order to generate a source of funds to help ameliorate those conditions.

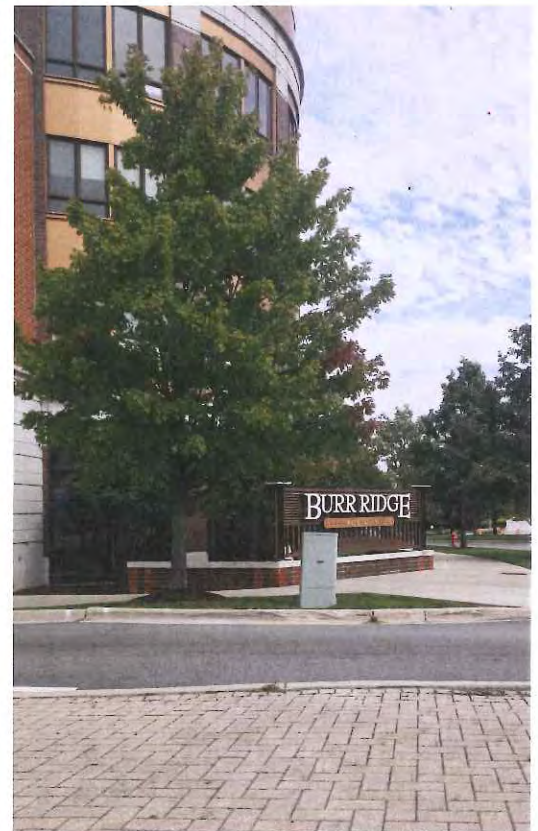
In February of 2012, SB Friedman was engaged to conduct a Business District eligibility study for the study area. We gathered background data including sub-area plans, traffic studies, the Village comprehensive plan, and other relevant documents. We also conducted field research and data analysis to determine whether the study area met eligibility criteria of the Business District law.

We completed a Redevelopment Plan for the Chestnut Waukegan Business District, and worked with Village staff and the property owner to develop a budget for the Redevelopment Project. In addition, we assisted the Village and their legal counsel with noticing and other public process aspects of the designation.

Results: The Village of Glenview adopted the Chestnut Waukegan Business District in August of 2012. The Village used BD taxes to help fund transportation improvements around the Chestnut/Waukegan intersection. Significant private investments including a new Culver's were subsequently made in the BD.

Village of Burr Ridge
**PROPOSAL FOR THE CREATION OF A
BUSINESS DEVELOPMENT DISTRICT**

October 2, 2020





October 1, 2020

Evan Walter
Assistant Village Administrator
Village of Burr Ridge
7660 County Line Road
Burr Ridge, IL 60527

Dear Mr. Walter,

The challenge to Burr Ridge in creating a Business Development District (BDD) extends beyond the technical analysis involved in that effort. To get the most out of this project, the Village is best served by considering the BDD feasibility study and plan in context of the ultimate goal, a vision for further development and planning in the downtown. Establishing the BDD as a financial construct for future planning is sound, but there is value to be had in doing so within the framework of future planning. Setting the stage for successful downtown reinvestment requires starting to address key planning questions now as you go through the BDD analysis:

- What can downtown planning accomplish for the Village and how is it different from reviewing proposed developments?
- How can Village leaders start to create a vision for the future of downtown that is unique to Burr Ridge?
- How can the Village Board be confident in funding and planning efforts for the downtown?
- How can stakeholders and the City become partners for creating a better downtown?

Teska's experience with Business Development Districts, SSAs, and similarly structured Tax Increment Finance (TIF) Districts, will allow us to assist the Village in determining eligibility for the BDD and preparing the district plan in keeping with all best practices and State requirements. Our experience as community planners and place makers will make this technical task the first step in your ongoing planning work for the Village's Downtown.

We look forward to further discussing with you this project and how we can serve the Village.

Sincerely,

A handwritten signature in black ink, appearing to read 'Lee Brown'.

Lee Brown, FAICP
President

A handwritten signature in black ink, appearing to read 'Michael Blue'.

Michael Blue, FAICP
Principal Consultant

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1 | Statement Of Project Understanding + Time Sensitivity

APPROACH TO PREPARING THE BUSINESS DEVELOPMENT DISTRICT

Teska is excited about the opportunity to work with Burr Ridge, to share our experience and knowledge, and to work together to create a Business Development District for the Village. While reviewing our project experience, we hope you will see our range of expertise in creating Business Districts, Tax Increment Financing Districts, SSAs, Enterprise Zones, and other similar economic development tools. At Teska, we tailor our studies and products to meet our clients' needs, whether they be simple assessments of feasibility, or sophisticated economic forecasting for strategic evaluation.

The attached proposal outlines three phases in establishing the Business Development District: Eligibility, Planning, and Adoption. Based on our experience in preparing BDDs and understanding of Downtown Burr Ridge, we anticipate that eligibility can be accomplished. However, we will structure our contract for the Village to close the project at the end of Phase 1 if we find that eligibility is not feasible. Likewise, we can define other "check in" points during the work at which the Village may choose to close or redirect the project. Our purpose is to give the Village confidence and flexibility that local funds for this project will be spent efficiently and effectively.

WORKING WITH LOCAL STAFF AND OFFICIALS

Preparing plans and studies working closely with the Village staff and local officials is an approach that our firm supports and enjoys. This ensures that best practices applied, and recommendations developed for the plan are specifically suited for the community and study area because they combine the community's unique insights of the area with the consultant's outside perspective and experience. At Teska we understand well the power and value of this strong working relationship.

STAYING ON BUDGET AND SCHEDULE

Teska has a proven record of completing projects on time and on budget. Our clients are communities ranging from large to small; our projects range from simple to complex. This experience will help us work with you to ensure thoughtful use of Village resources. Teska this year celebrates 45 years of service to clients, primarily in and near the Chicago metropolitan area. Many of those clients are repeat customers, some dating back decades. These relationships are built on providing quality work and a commitment to meet clients' needs. This approach would be foremost in our work with Burr Ridge.

2 | Scope of Work

PHASE 1: Business District Eligibility Study

TASK 1.1 | Project Initiation Meetings

Teska will meet with Village representatives for the purpose of introducing the participants to the scope of the project, Business District (BD) schedule, plan objectives and information needs. During this meeting responsibilities for each task will be reviewed and agreed to.

TASK 1.2 | Plan and Visioning Workshop

As part of the project kickoff, Teska will conduct a Village Board workshop to outline the BDD process and how it fits into overall planning for the downtown area. The goal will be to paint the big picture as the Village begins this planning effort – conducting even a technical process like the BDD and plan is difficult if not processed in context of its overall purpose.

The questions raised in the cover letter to this proposal (and others) would be raised – not to be answered but kept in mind as the project proceeds. The discussion can also incorporate other Village policy documents, vision statement and relevant strategic goals. Members of the Village Plan Commission / ZBA, advisory bodies, and other stakeholders can be part of the workshop as the Village may desire.

TASK 1.3 | Eligibility Survey

Teska will conduct a field survey of all parcels in the Project Area to identify existing land uses, site conditions, above ground public infrastructure conditions, and building characteristics in accordance with eligibility criteria contained in the Business District Act (“the Act”) (65 ILCS 5/Art. 11 Div. 74.3). A photographic inventory of the properties evaluated in the field survey of the Project Area will be prepared.



2 | Scope of Work

TASK 1.4 | Background Data Collection and Base Map Preparation

Teska will work with Village staff to obtain other supplemental information from official records related to the eligibility of the Project Area. The Village will provide Teska with the following information:

- GIS digital base map of the Project area showing all tax parcels, and PIN identification numbers for all parcels (property identification numbers uses for tax purposes);
- Most recent Total Equalized Assessed Value for the subject parcels and the total Village of Burr Ridge, as well as the five years prior to the most recent year;
- Code violation information for all properties, if available or appropriate (all violations within last five years);
- Information and cost estimate on proposed public improvements, if available (utilities, roads, etc.);
- Information on any pending and proposed redevelopment plans;
- Any other information that may be pertinent to establishing the eligibility of the Project area.

Teska will prepare a project base map (in digital format) with parcel and tax identification information which serves to meet the statutory standards for document eligibility.

TASK 1.5 | Data Analysis

The information obtained through the field survey, and through the review of pertinent documents, will be tabulated and analyzed to determine whether the Project Area is eligible as a Business District Redevelopment Project Area. Prepare an initial model to calculate anticipated revenue generated from the BDD with adjustable variables representing alternative boundaries, tax rates, timing, etc, to further inform the village of project feasibility. Teska may explore with Village staff one or more BD boundary options in order to establish an eligible district.

Task 1.6 | Eligibility Findings Report/Meeting

One digital copy of the eligibility findings will be submitted in advance of a Village staff meeting that Teska will attend to present the results and determine the appropriate future course of action.

2 | Scope of Work

PHASE 2: Redevelopment Plan and Program

Task 2.1 | Redevelopment Plan Preparation

Teska will work with Village staff to prepare a Redevelopment Plan. The Plan will include recommended boundaries, project objectives, land uses, recommended public and private improvements, infrastructure needs, and design objectives related to the overall goals for this area. The recommendations developed as part of the Village's Comprehensive Plan and other previous planning efforts will provide the conceptual basis for the BD Redevelopment Plan.

Teska will prepare an evaluation of alternative approaches to fund business district improvements comparing likely revenue streams from Business Development Districts, Special Service Areas and Tax Increment Finance Districts to inform property-owners and decision makers of the costs, revenues and benefits of alternative approaches.

Task 2.2 | Redevelopment Program Formulation

Simultaneously with the preparation of the Redevelopment Plan, a Redevelopment Program will be prepared in accordance with the requirements of the BD Act. The Redevelopment Program will identify and estimate costs for public and private improvements, and other eligible project expenses. The program will also include an estimate of additional sales tax revenues. The Village will provide Teska with cost information for all public improvements that may be included as eligible project costs. Teska may supplement this information with costs associated with streetscape improvements to public rights-of-way and landscape enhancements for private property.

Once the revenue projections have been prepared, Teska will recommend potential uses of the revenue from the following sources:

- Current municipal plans for projects and activities within the BD.
- New information obtained by the municipality through meetings with BD constituents relative to their specific goals and objectives for the BD.
- Additional recommendations from Teska's experience with similar programs and activities employed in other communities to develop the market within the Village's BD.

Task 2.3 | Boundary Survey and Legal Description

Subsequent to the decision on the boundaries of the BD district in Phase 1, the Village will prepare a legal description of the boundary of the proposed BD district.

Task 2.4 | Meeting to Discuss Draft Eligibility and Redevelopment Plan and Program

One digital copy of the draft eligibility findings and Redevelopment Plan and Program will be submitted in advance of a Village staff meeting that Teska will attend to present the results and determine the appropriate course of action prior to presentation to the Village Board.

2 | Scope of Work

Task 2.5 | Village Board Workshop: Proposed Redevelopment Plan and Program

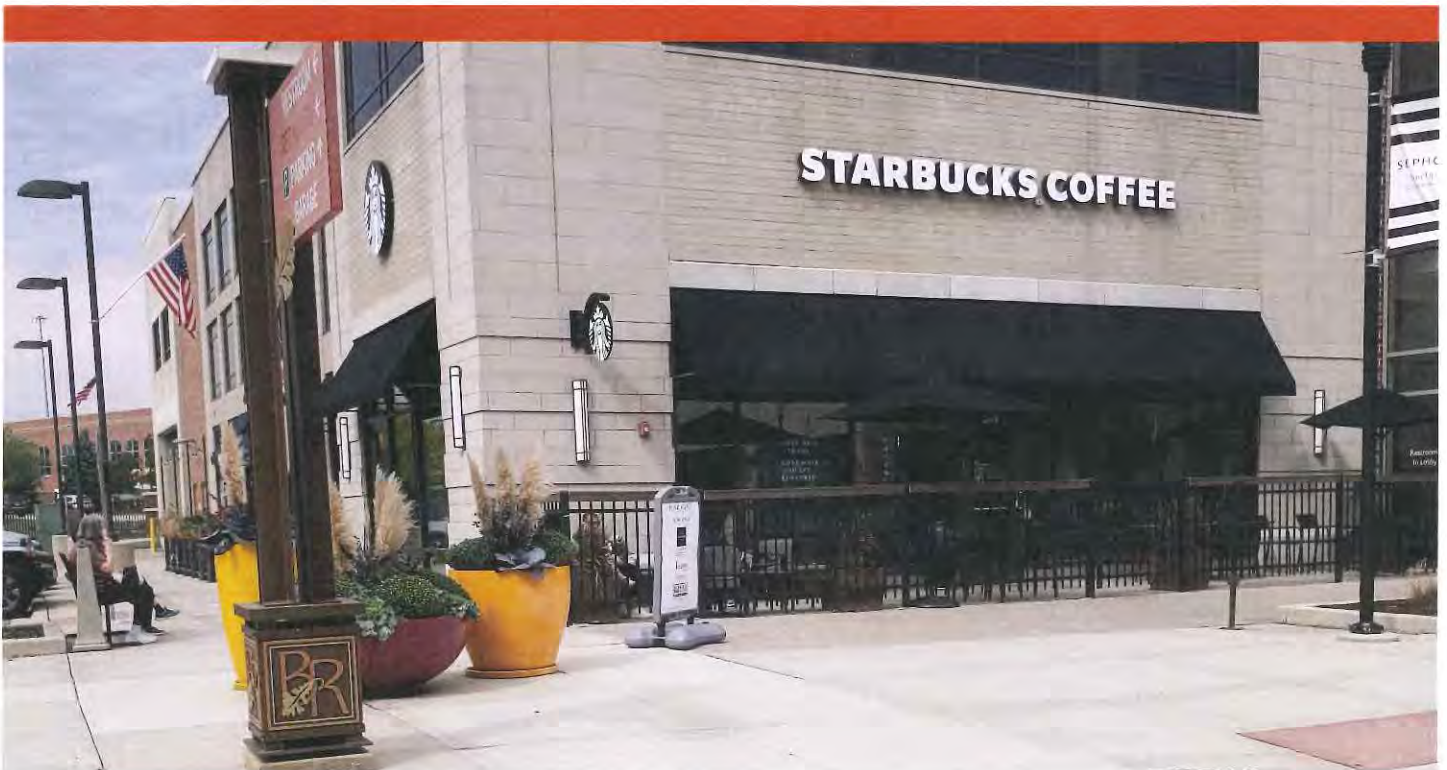
Teska will submit one original hard copy and one digital copy of the draft Redevelopment Plan and Program, and will attend a workshop with the Village Board to present the proposed Redevelopment Plan and Program. Based on comments and suggestions, Teska will revise the Plan and Program report. The presentation will focus on:

- Discussion of recommended redevelopment scenarios for the subject parcels.
- Discussion of incorporation of corridor enhancements, which may include streetscape, landscape, signs or infrastructure improvements.
- Consensus regarding redevelopment strategies and options.

The Village Board must pass a resolution authorizing a public hearing relating to proposed Business District.

Task 2.6 | Community Meeting(s)

Teska will lead two meetings for communitywide review of the Plan and Program, with focus on participation of business and property owners within the project area. The two meetings would have common content, and be held within a week or so of each other to provide flexibility for those wishing to attend. Depending on current conditions, the meetings can be either live or virtually. Based on the outcome of these meetings, additional modifications may be made to the report.



PHASE 3: Public Review and Adoption

Task 3.1 | Public Notice of Meetings

Teska will prepare all required mailed and public notifications of required public hearings as described in State statutes and will keep complete records of these notices. The Village shall be responsible for mailing and publishing the required mailed and public notices.

Task 3.2 | Public Hearing

Teska will participate in a public hearing before the Village Board as required by Illinois Revised Statutes. This hearing shall occur at least one week prior to the approval of the BD Redevelopment Plan.

Task 3.3 | Village Board Deliberations

Teska will attend one additional meeting of the Village Board following the close of the BD public hearing and provide assistance to the Board in its deliberations and consideration of the BD role in future downtown planning.

Task 3.4 | Minor Amendments

Minor amendments to the BD Redevelopment Project report will be prepared by Teska, if required, as a result of Village Board deliberations in Task 3.3.

Task 3.5 | Adjustment to Survey and Legal Description

If, on the basis of Board deliberations, the boundaries of the BD District are recommended to be different from the area defined by legal description in Task 2.3, the Village will prepare the necessary adjustments to the survey and legal description necessary for preparation of the BD ordinances.

Task 3.6 | Ordinances

Teska will work with the Village's attorney to prepare the ordinances required for the adoption of the BD.



3 | Project Budget + Timeline

Timeline

We anticipate the planning and approval process to take approximately 4 months. The following chart outlines the anticipated timeline for the project. All noted staff in this proposal are available to complete the required tasks for the Burr Ridge Business Development District within the noted time-frame. The timing of each activity is indicated on the timeline. Additional meetings with property/business owners may extend the anticipated timeline.

	NOV	DEC	JAN	FEB
PHASE 1				
PHASE 2				
PHASE 3				

Fee Structure

The following table details the hours and hourly rates that will be applied for this project. We propose to conduct the work program outlined in this proposal for a not to exceed cost of \$23,500.

Discipline/Staff Member	Projected Hours	Hourly Rate
Lee Brown	16	\$190
Michael Blue	35	\$160
Pete Iosue	60	\$120
Carol Brobeck	71	\$105

4 | Staff Background

Teska Associates will incorporate into this project its decades of experience in economic development and preparing related tools like TIFs and BDDs. Lee Brown and Pete Iosue have prepared numerous such assignments over the years and are current on relevant rules and regulations. Their work goes beyond just “running the numbers”; as planners they advise communities on the long term and community development implications of the way these economic development tools are used.

This approach is furthered by having Michael Blue as Project Manager and Carol Brobeck as Project Associate. Michael brings years of experience as a Community Development Director, working for communities conducting economic development establishing, and implementing tools such as TIFs and SSAs. This perspective will be applied to our working with staff and elected officials to address planning, development, budget, and community planning considerations of the BDD. Carol likewise adds to this crossing of the technical and policy aspects of the project. Trained as a planner, Carol has worked several SSA and TIF projects while at Teska.

More information about the firm can be found at our website: www.TeskaAssociates.com



LEE BROWN, PRESIDENT, FAICP

Principal-in-Charge: Lee will serve as a resource for our work in Burr Ridge. His planning experience includes advising many clients on funding economic development activities.

Hourly Rate = \$190/hr



PETE IOSUE, SR. ASSOCIATE, AICP

Project Planner: Pete will lead the eligibility and redevelopment plan assessments. His work at Teska covers a range of topics, with an emphasis on economic development tools like TIFs and BDDs. Pete recently completed BDDs in Fox River Grove and Lake Villa.

Hourly Rate = \$120/hr



MICHAEL BLUE, PRINCIPAL, FAICP

Project Manager: Michael will be primary client contact and lead planner in serving Burr Ridge. His experience includes conducting economic development assignments as both a consultant and municipal staff member.

Hourly Rate = \$160/hr



CAROL BROBECK, ASSOCIATE

Project Associate: Carol will work with Michael and Pete conducting data collection and analysis tasks, as well as community input tasks.

Hourly Rate = \$105/hr

SELECTED EXPERIENCE

Mr. Blue has a unique background working in both the public and private sectors of planning. He started his career as a consultant working in the areas of comprehensive and commercial area plans, development land use and economic impacts, and public engagement. After more than a decade, he moved to the public sector and spent 15 years working as a community development department manager, where his focus shifted to the day to day operations of development approval, economic development, managing public commission processes, personnel, and municipal governance. Having returned to consulting, these experiences afford Mr. Blue a wide-ranging perspective when conducting planning assignments, helping him to appreciate the viewpoints of multiple stakeholders and understanding their expectations regarding different situations and issues.

Prior to joining Teska Associates in 2013, for eleven years Mr. Blue was the Director of Community Development in Highland Park, IL. There he managed a department of 30 staff and focused on long range planning, review and approval of proposed development projects, building permit approval, and support of City Council and Commission activities. The Department served nine City Commissions addressing issues of development, housing, historic preservation, cultural arts, and the natural environment. While in Highland Park, Mr. Blue managed passage and implementation of the City's affordable housing ordinance. Before his position in Highland Park, Mr. Blue served as Deputy Community Development Director in the Village of Mount Prospect, IL for five years, managing staff in day to day operations related to planning, building permits and code enforcement.

Mr. Blue is actively involved in local and national leadership of the American Planning Association, and is currently the Planning Officials Development Officer for the IL - APA. In this role he aided in developing a curriculum for training plan commissioners throughout the State; a program for which he and others received the organization's 2013 Distinguished Service Award. In 2008 Michael was selected to the College of Fellows of the American Institute of Certified Planners. He regularly speaks at local, state, and national conferences on a range of planning themes, most recently on topics related to the development approval process, economic development, and local government organizational management. He also has been a guest lecturer at a number of university classes on topics like the development approval process and affordable housing.

PROFESSIONAL AFFILIATIONS

College of Fellows of the American Institute of Certified Planners (FAICP)
American Planning Association (APA)
Lambda Alpha Economics Society
Planning Officials Development Officer for the Illinois Chapter of the APA



MICHAEL BLUE, FAICP
Principal

EDUCATION

B.A. Urban Planning
University of Illinois (Urbana)

M.U.P. Urban Planning
University of Illinois (Urbana)



REPRESENTATIVE PROJECTS

Development Ordinances

Drafted zoning ordinance updates for Bourbonnais, Elk Grove Village, and Des Plaines, IL, and Elkhorn WI. Prepared zoning ordinance evaluations to identify code strengths and needs for Edwardsville, Rolling Meadows, and Wood Dale, IL, leading to working with Edwardsville staff to update deficient code elements and a full update in Rolling Meadows. Worked with Champaign, IL to revise select commercial and residential zoning districts to facilitate desired development forms; and with Glenview, IL to make regulations easier to understand for the public and staff (included scripts for informational videos and zoning review checklists). Drafted a zoning district adopted jointly by Mattoon and Charleston, IL to facilitate development in the corridor between the communities (district won an award from the IL-APA). While working for the City of Highland Park, oversaw numerous amendments to zoning and subdivision ordinances related to planned developments, signs, permitted uses, bulk regulations, and development approval procedures.

Economic Development / Strategic Planning

Worked with Warrenville, IL to prepare a Strategic Plan that focused on economic development and addressed community character, natural resources, and public services. As follow-up, prepared the Southwest District Plan for the City, which along with a TIF has supported new development in the area. Prepared the first Strategic Plan for Round Lake, IL. Prepared market studies for Winfield, and Urbandale, IA. Developed land use guidelines for Metra Commuter Rail for optimal land use configurations that encourage economic development around commuter stations. Prepared CMAP Homes for a Changing Region Plan for NW DuPage cluster. Developed unique "market studies" to determine growth opportunities for the Salvation Army and the Rosenwald religious school in Chicago. As Deputy Community Development Director for Mount Prospect, worked with Village's Economic Development Commission and conducted business retention / attraction assignments.

Comprehensive Plans

Conducted comprehensive plans for Illinois communities including Wood Dale, Round Lake, Rolling Meadows, Des Plaines, Manteno, Mokena, New Lenox, Glencoe, Carbondale, and Darien (village and park district). Also prepared comprehensive plans for Brownsberg, IN, Dublin, OH, Urbandale and West Des Moines, IA, and Elkhorn, WI.

Current Planning and Development Review

Managed all aspects of development zoning approval and building permit application review while working in Mount Prospect and Highland Park. Conducts plan development review services for Salem Lakes, WI and served as outside planning consultant to Villages of Round Lake, Mokena and River Forest. Have also provided development support services / zoning testimony for private sector clients.

Downtown & Commercial Area Planning

Prepared downtown, business district and corridor plans, including in Winnetka, Libertyville, Northfield, Des Plaines, Kenilworth, River Forest, and Melrose Park, IL and Toledo, OH. Led downtown planning projects while working for Mount Prospect and Highland Park. In Mount Prospect, plan was geared toward implementing the Tax Increment Finance (TIF) District and highlighted redevelopment opportunities. For Highland Park, downtown plan involved extensive public input and a large working committee structure. The work created a new vision of the downtown and considered potential for redevelopment. In Highland Park, also led establishment of TIF District and development plan for the Ravinia Business District.

Development Review Process Evaluation

Prepared audit of new Development Services function for Greensboro, NC to identify system enhancements and opportunities to use new technologies. Also worked with the Greensboro Planning Department to develop a Strategic Plan, Work Program, and revised job designations. In Lake Forest, IL, conducted an assessment of Community Development plan review functions, including, building permits, design review, and zoning entitlements. While working for Mount Prospect, prepared assessment of development review functions conducted over multiple departments. In Highland Park, oversaw evaluation of permitting functions and review of commission operations, with intent of consolidating those functions where appropriate.



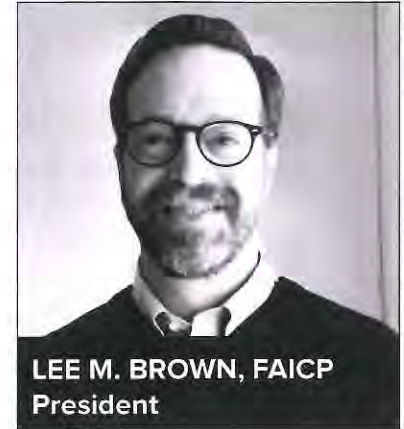
SELECTED EXPERIENCE

Lee Brown has more than 40 years of experience as an urban planner, working for municipalities in the Chicago metro area and a variety of communities throughout the country. As President of Teska Associates, Inc., Mr. Brown leads a diverse team of skilled professionals to identify and solve the complex problems that accompany community growth and change. In the Midwest, he has led planning efforts in small towns, mature suburbs, and urban neighborhoods building partnerships and forging consensus for change. With support from Teska's team of urban designers, Mr. Brown has been innovative in his application of technology to community participation in the planning, design, and implementation processes.

In addition to strategic, long range, comprehensive planning for neighborhoods and communities, Mr. Brown's primary focus has been on business district revitalization, including the preparation and implementation of target economic development strategies, site specific private developer recruitment, tax increment financing, and public-private partnerships.

Mr. Brown has been a leader in developing strategies for community development in small, mid-sized, and large cities and regions. His work in Greensboro, North Carolina has led to award-winning community development projects, including the conversion of a former brownfield site in a disinvested area near downtown into a vibrant, mixed use neighborhood now known as Southside. He has led sustainable and strategic planning efforts which include the reuse of aging shopping centers, has crafted a strategy that addresses development and planning issues for community-based organizations, and has prepared corridor plans that have sparked redevelopment and reinvestment around the University of North Carolina Greensboro campus.

He is a certified planner and a Fellow of the American Institute of Certified Planners (FAICP). He served on the Board of Directors of the American Planning Association, and as President of the American Institute of Certified Planners from 2013-2015. He previously served as the APA Illinois Chapter president, and helped establish APA's Planning Officials Development Officers program. Mr. Brown is a member of the Board of Director of Landmarks Illinois, the nonprofit organization dedicated to protecting the great architectural heritage of the State of Illinois.



EDUCATION

B.U.P. Urban Planning
University of Illinois (Urbana)

M.S. Urban Planning
University of Wisconsin
Madison, Wisconsin

PROFESSIONAL AWARDS + AFFILIATIONS

- 2016 AICP President's Award for Achievements in Advancing the Art and Science of Planning
- Member, Board of Directors of Landmarks Illinois
- Former President, American Institute of Certified Planners (2013-2015)
- College of Fellows of the American Institute of Certified Planners
- American Planning Association
- Former President of the Illinois Chapter of the American Planning Association
- Lambda Alpha International, Honorary Land Economics Society
- Co-recipient of the 1999 Distinguished Contribution Award of the American Planning Association
- Co-recipient of the 2003 Outstanding Planning Award for Implementation of the American Planning Association
- 2 time recipient of the Distinguished Service Recognition from the Illinois Chapter of the American Planning Association



REPRESENTATIVE PROJECTS

Comprehensive Plans

Algonquin, Barrington Hills, Bartlett, Cicero, Mettawa, Park Ridge, Pontiac, Richton Park, River Forest, Wheaton, Will County, DeKalb County IL, and Elkhorn WI; City of Brooklyn Park MN; City of Chesapeake VA. Comprehensive Park and Recreation plans in Monona WI and Batavia IL.

Strategic Plans and Master Plans

Elgin City Center, City of Jacksonville Urban Enterprise Zone, Highland Park Hospital, City of West Chicago, and Downtown Waukegan IL; Madison IN; DeForest WI; South Bend, IN, Greensboro, NC.

Zoning and Land Use Testimony

Arlington Heights, Bloomingdale, Bensenville, Evanston, Glendale, Highland Park, Hoffman Estates, Joliet, Lake Forest, Lincolnshire, Niles, Oak Brook Terrace, Park Ridge, Riverwoods, Rockford, Roselle and Schaumburg IL.

Market and Fiscal Impact Analysis

Two-million square feet of office for Homart Development Company; 3.7 million square foot corporate office center for Ameritech Services, Inc.; village-wide fiscal impact models for Bartlett and Hoffman Estates IL, and Elkhorn and Mequon WI.; 6 square mile mixed use development area for the Village of Lake Bluff IL; 900 acre mixed use development near Aurora IL; 40 acre mixed use redevelopment in Glenview, IL., hotel and conference center feasibilities for Brookfield Zoo, Brookfield IL; public and private development projects throughout metropolitan Chicago.

Tax Increment Finance District Development

Arlington Heights, Aurora, Bartlett, Bedford Park, Bensenville, Bridgeview, Chicago, Crystal Lake, Galena, Hoffman Estates, La Grange, Lake Forest, Lansing, Libertyville, North Aurora, Quincy, River Forest, Rockford, Waukegan, Wheaton and Wheeling; Woodstock, IL; Monona, WI.

Residential Development Design

900 acre Waterfront Development in Portage IN; 140 acre Villa Olivia golf course/residential PUD.

Site Planning

Melvin Simon and Associates; Pathway Financial Corporation; McDonald's Corporation; North Shore Gas Company; The Goldman Companies; The Taubman Company; Illinois Department of Transportation.

Computer Modeling

Financial/Econometric Tax Increment Finance models; shared parking optimization; real estate and project feasibility studies; capital improvement scheduling; life cycle costing; debt and fiscal impact forecasting; FAR and density models, 3D interactive business district models; and geographic data base systems.

Development Regulation

Traditional Neighborhood Design District Regulations and Pedestrian Overlay District Regulations in Greensboro, NC, City of Kenosha WI, Unified Appearance and Design Ordinance; City of Monona WI Performance Zoning Ordinance; City of DeForest, WI, Zoning and Subdivision Codes; City of Braidwood IL Zoning Ordinance; City of Chesapeake VA Zoning Ordinance; Loudoun County VA Zoning Ordinance; City of Elkhorn, WI Zoning Update; City of Evanston IL Signs and Graphic Control Ordinance; City of Brooklyn Park MN Building Maintenance Code; River Forest IL Zoning and Subdivision Ordinances; Park Ridge IL Urban Design Guidelines; Bartlett IL Landscape Standards and Tree Preservation Ordinance; Traverse City MI, Master Planned Unit Development Ordinance.

Continuing and Current Planning

Review of private development projects including annexations, site plans, subdivisions, rezonings, variations, special use permits, fiscal impacts, and signs for the municipalities of Algonquin, Bloomingdale, Barrington, Bartlett, Barrington Hills, Bensenville, Galena, Gilberts, Glencoe, Highland Park, Kenilworth, Mettawa, Park Ridge, River Forest, Riverwoods, and Winfield IL.

Neighborhood and Community Planning

Strategic plans for neighborhood revitalization in Aurora, IL, Chicago, IL, South Bend, IN, Greensboro, NC, and Rockford, IL.



SELECTED EXPERIENCE

Mr. Iosue's focus has been on helping small to medium sized communities with review of current development proposals, development of appropriate zoning regulations, development of comprehensive plans, and the creation and maintenance of Tax Increment Financing (TIF) districts. Mr. Iosue is currently working on a wide variety of projects including: Tax Increment Financing projects for the City of Calumet City, Village of Crestwood, Village of Hillside, and Village of Lyons, as well as developer recruitment for the Village of River Grove, a comprehensive plan for the Village of Bedford Park, and a review of the City of Rochelle's zoning ordinance.

Prior to joining Teska Associates, Inc., Mr. Iosue spent over four years serving as the Assistant City Planner for the City of Hammond, IN. He provided staff support for the Hammond City Plan Commission, Board of Zoning Appeals and Historic Preservation Commission, and was responsible for compiling and maintaining census information for the City.



PETE IOSUE, AICP
Senior Associate

EDUCATION

B.A. Urban and Regional Planning
University of Illinois (Urbana-Champaign)

PROFESSIONAL AWARDS + AFFILIATIONS

American Institute of Certified Planners (AICP)
American Planning Association (APA)

Tax Increment Financing

- Village of Arthur
- Village of Bedford Park
- Village of Beecher
- Village of Berkeley
- Village of Broadview
- City of Crystal Lake
- Village of Diamond
- Village of Fox River Grove
- Village of Hodgkins
- Village of Lake Villa
- Village of Monee
- Village of North Aurora
- Village of Oak Lawn
- Village of Olympia Fields
- City of Peoria
- City of Rochelle
- Village of Schaumburg
- City of Warrenville
- Village of Western Springs
- City of Woodstock

Comprehensive Plan Updates

- Village of Beecher
- Village of Broadview
- Village of Braceville
- City of Coal City (mapping)
- DeWitt County
- Village of Matteson (mapping)
- City of Morris
- Village of North Aurora
- City of Palos Heights

Continuing Services/Development Review

- Village of Bedford Park
- Village of Beecher
- Village of Broadview
- City of Kankakee
- Kendall County
- City of Morris
- Village of North Aurora
- Village of Olympia Fields

Zoning Regulations

- Village of Itasca (historic downtown)
- Village of North Aurora (sign ordinance, lighting ordinance, etc.)
- Village of Elburn (sign ordinance)

Business Development Districts

- Village of Fox River Grove
- Village of Lake Villa



SELECTED EXPERIENCE

Ms. Brobeck has worked on a range of community planning and economic development projects. With a lifelong passion for languages and promoting cross-cultural understanding, Carol's experience in engagement, bilingual outreach, and economic development provide a broad framework for community planning for advancing quality of life. Carol is skilled in demographic, economic, and land use analysis and visual representation. She is proficient in using a variety of tools, such as the Adobe Design Suite, ArcGIS + Web, ESRI Business Analyst.

Since joining Teska in 2018, Carol has worked on a variety of planning projects, including comprehensive and corridor plans, feasibility analyses, tax increment financing and special service area districts. In 2019, she provided on-site auxiliary planning support for Warrenville, IL, and translated the City of Rolling Meadows' Comprehensive Plan into Spanish. Carol has also prepared outreach materials and led conversation in Spanish for multiple projects. Carol began dabbling in graphic design as a teenager and loves the continual challenge of incorporating effective design in to her work as a planner.

Before coming to Teska, she compiled economic development research for the University of Illinois Extension to assist small and rural communities in Illinois. Prior to that she served as a Community Development Intern for the Village of Mount Prospect, acting as a first point of contact for Business Licensing applicants, coordinating intake, processing, and tracking approval with multiple governmental departments.

PROFESSIONAL AFFILIATIONS

Member, American Planning Association
Project Manager, APA-IL Pro Bono Program

REPRESENTATIVE PROJECTS

Long Range Planning

Route 83 Corridor Plan, CMAP LTA grant*
DuPage County, IL

Comprehensive Plan Update, CMAP LTA grant*
Village of Beecher, IL

Comprehensive Plan Update
City of Palos Heights, IL

Spanish Translation

Comprehensive Plan
City of Rolling Meadows, IL

Special Service Area (SSA)

Howard Street SSA #19
Reconstitution
City of Chicago, IL

Central Street SSAs #7, #8
Feasibility + Establishment
City of Evanston, IL

Zoning/Data Analysis

Zoning Ordinance Update
City of Edwardsville, IL

Land Bank Feasibility Analysis (IHDA Grantees)
City of Freeport, IL
Southwestern Illinois Development Authority (SWIDA)



CAROL BROBECK
Associate

EDUCATION

M.U.P. University of Illinois
Urbana-Champaign (UIUC)
Community Economic
Development

B.A. Berea College
Spanish and Sociology

LANGUAGES

Spanish ●●●●●●●●
French ●○○○○○○○
Hindi ●○○○○○○○

CERTIFICATIONS

AICP Candidate

Teaching English as a Foreign
Language (TEFL) Certificate

* Engagement materials/outreach in Spanish



5.1 | Firm Background



TESKA ASSOCIATES

- Project Management
- Planning
- Engagement
- Design
- Economics
- Zoning
- Placemaking

EVANSTON OFFICE
627 Grove St.
Evanston, IL 60621
847.869.2015

PLAINFIELD OFFICE
24103 Lockport St. #107
Plainfield, IL 60544
815.436.9485

FIRM ORGANIZATION

Teska Associates, Inc is a 20 person firm of planners and landscape architects. Through these two disciplines, the firm can provide a complete range of planning, zoning, development review, urban design and site planning services. The firm's clients include both municipalities and developers. In this way, we are not just drafters and providers of development regulations, but customers as well. Seeing local services from both sides of the table allows us to better understand the development process and provide optimal outcomes for communities.

BUILDING RELATIONSHIPS

We cherish long-term client-consultant relationships built by listening intently to client needs, maintaining clear and frequent contact, providing timely and responsive service, and exceeding expectations.

CREATING LIVABLE COMMUNITIES

We are passionate about creating livable communities; places with a strong economy, walkable and safe streets, and great venues to play and interact with neighbors.

GOING THE EXTRA MILE

We know that our success is based on the quality of our service. At Teska, quality service is based on responsiveness, anticipation of needs, maintaining flexibility, and creative and efficient problem solving.

HONEST ANSWERS TO TOUGH QUESTIONS

We provide solutions that are creative and realistic. Based on our experience and analysis, we sometimes have to tell a client that in our opinion an idea won't work - but that rejection is quickly followed by a solution that works.

5.2 | Firm Experience

Project Experience Overview

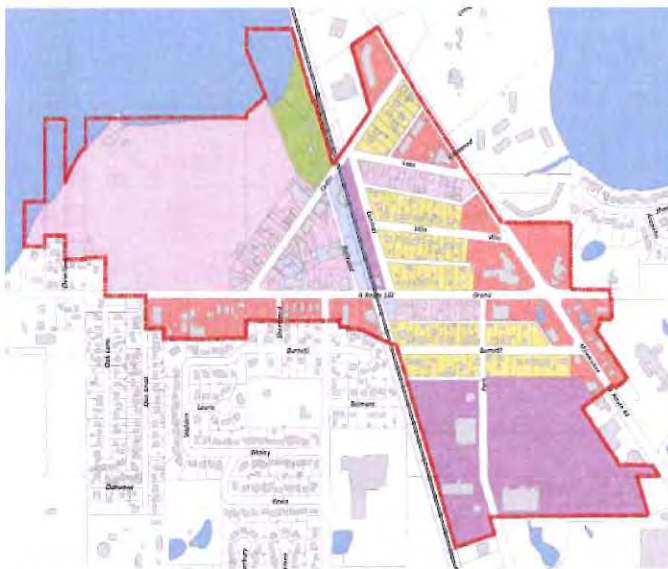
Teska Associates' multi-disciplinary team of planners, landscape architects, and engagement specialists and the firm's vast range of experience in planning, economic development, zoning, and community outreach allows for the creation of great plans with comprehensive, multi-faceted and focused results. Teska has prepared dozens of economic development plans and financing tools for communities (such as TIFs, BDDs, SSAs Enterprise Zones). Our implementation-focused work is built from our successful long-term, on-going client relationships. Below is a list of projects detailed in this section:

- Lake Villa Tax Increment Financing and Business District
- North Aurora Route 31 Tax Increment Financing District
- Hodgkins East Avenue Tax Increment Financing District
- Olympia Fields Lincoln Highway and Western Avenue Tax Increment Financing District
- North Schaumburg Tax Increment Financing District
- Broadview 19th Street Tax Increment Financing District
- Fox River Corridor Plan
- Fox River Grove downtown Subarea Plan
- Enterprise Zones - Bedford Park, Hodgkins, McCook, Summit, Justice, and Bridgeview



TAX INCREMENT FINANCING + BUSINESS DISTRICT

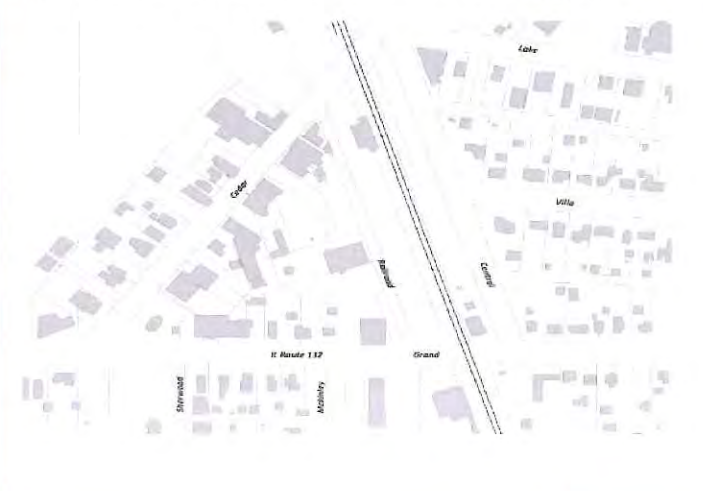
Lake Villa, IL



In 2012, Teska Associates led a consulting team to work with the Village of Lake Villa to develop a Transit Oriented Development (TOD) plan which created an economic development strategy for the downtown business district. One of the key recommendations in the plan was to create incentives for public private partnerships to support economic development.

In 2015-2016 Teska led two parallel efforts to put in place a Tax Increment Finance (TIF) District and Business District to implement the recommendations in the Plan. The goal of the Downtown TIF is to support private investment in the downtown commercial district and nearby industrial park. Various development sites have been identified including the 60-plus acre Sherwood Park property located on Cedar Lake, which has been vacant since the privately-owned park closed in 1991 as well as opportunities for redevelopment of older buildings in the downtown.

Teska also worked with the Village to create a Downtown Business District to expand the financial incentives to raise funds for matching grants, support private investment, and make public improvements to the downtown.

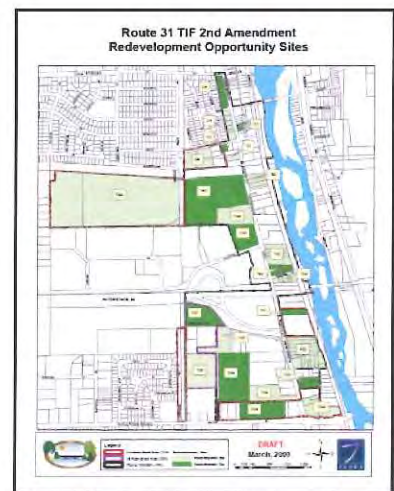
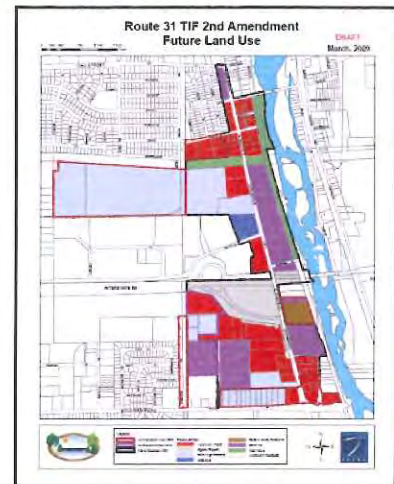




ROUTE 31 TAX INCREMENT FINANCING DISTRICT NORTH AURORA, IL

Teska Associates has assisted the Village of North Aurora in the creation of two adjacent TIF districts. The first, and largest TIF in the Village, is the Lincoln Highway TIF. This 323 acre TIF extends north and south along Route 31, including the Village's interchange with Interstate 88 and the community's downtown district. To date, this district has spurred redevelopment of a vacant office building into Olympia College, aided major renovation of several businesses, and helped to fund several beautification efforts as well as the Village's new police station.

Teska also assisted the Village in the creation of the Sperry TIF - a small single project district created to promote the redevelopment of a brownfield site adjacent to the Fox River. TIF funds were used to clear the site and address environmental issues required to make the site available for redevelopment. Wyndham Deerpoint Homes is currently developing the site for a 42 unit townhome development, with beautiful views of the Fox River and access to extensive recreational amenities.





TAX INCREMENT FINANCING EAST AVENUE TIF DISTRICT

HODGKINS, IL

TAX INCREMENT FINANCING

The Village of Hodgkins established TIF District #3 in 2011. Due to a down economy and decreasing property values within the Village since the establishment of the District, the Village initiated reconfiguration of the existing District and the creation of the new East Avenue Tax Increment Financing District #4. This process allowed for the new TIF district to establish a lower base property value to compensate for the unanticipated decrease resulting from the recent downturn in the economy, and allows the Village to capture additional incremental revenue that was anticipated by the original TIF plan.



The old (left) and new (right) TIF District boundaries.



New construction within the TIF district.



Vacant land suitable for industrial development



Vacant retail center (currently fully occupied)



LINCOLN HIGHWAY & WESTERN AVENUE TIF OLYMPIA FIELDS, IL

In 2008, the Village of Olympia Fields, with the assistance of Teska Associates, Inc. ("TESKA") and Business Districts, Inc. ("BDI") prepared the Olympia Fields Retail Business Assessment, Marketing Strategy & Site Development Action Plan. This plan examined development strategies throughout the Village, and at the Lincoln Avenue and Western Avenue intersection in particular. Subsequently, in 2009 the Village, in cooperation with the City of Chicago Heights, prepared a more detailed examination of the area through the Western Avenue / Lincoln Highway Corridor Study.

The planning process involved in the creation of these plans recognized the need for revitalization of this prominent intersection within the Village. These plans identified specific development opportunity sites, including vacant parcels and potential redevelopment opportunities. New (re)development on these sites will become the catalyst for reinvestment in the area, while targeted public improvements may also serve to improve the appearance of the area and ultimately spur private investment. In 2013, the Village retained TESKA to assist the Village in the creation of a tax increment financing program for the Project Area.

The TIF was used to consolidate parcels and attract a new Walmart, which is scheduled to start construction in the fall of 2015.





NORTH SCHAUMBURG TIF SCHAUMBURG, IL

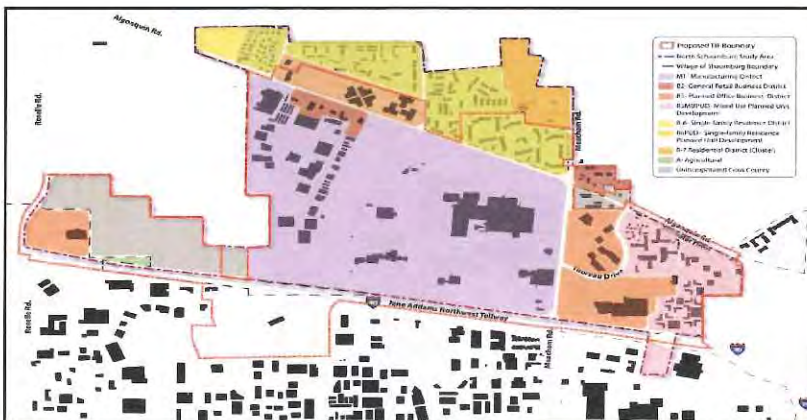
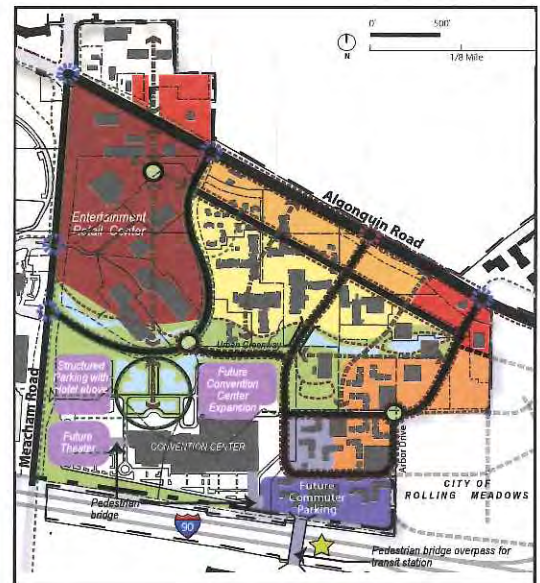
TIF PROJECT

The North Schaumburg TIF area encompasses properties generally located along Meacham Rd. and Algonquin Rd. in Schaumburg. The Village of Schaumburg initially created the STAR LINE / TOD Tax Increment Financing District in 2009, which was located within the North Schaumburg TIF area but was eventually dissolved in 2011. In 2012 Teska was brought in to reevaluate an expanded TIF area, including the nearby Motorola campus and other nearby commercial and residential properties.

Over the past 20 years the Village has carefully planned for the improvement of this section of the Village for purposes of strengthening its long term viability and expanding its tax base, and the North Schaumburg TIF plan was developed in coordination with the Village's other planning efforts. In 2008, the Village completed the STAR Line Transit Oriented Development District Plan, and updated and expanded this plan in 2013, now referred to as the "North Schaumburg Concept Plan," which serves as a planning document for guiding future development within the North Schaumburg TIF area.

The North Schaumburg TIF has immediately begun to show results. In late 2013, Schaumburg based Zurich Insurance announced plans to construct a new headquarters for its 2,500 employees on approximately 30 - 40 acres of the Motorola campus. Construction of the new facility is expected to produce an additional 700 jobs. The Redevelopment Plan was approved in January, 2014.

Walden Village Land Use Plan



* ARTIST RENDERING OF CONCEPTUAL SITE DESIGN



19TH STREET TAX INCREMENT FINANCING

Mature suburbs face a number of challenges when it comes to redevelopment. The Village of Broadview Comprehensive Plan, developed by Teska, identified a number of sites throughout the community that were underutilized. One key underutilized area was a 10 acre area at the southwest corner of 19th Street and 17th Avenue. This site contained an old bowling alley and several other vacant or declining properties. The Village retained Teska to determine eligibility, create a redevelopment plan, and assist in negotiation and plan review for a new commercial development. Despite a difficult economy, a Chase Bank was recently constructed and the developer, Heritage Companies, is actively marketing the remainder of the Center.

BROADVIEW, IL



Recently Completed Chase Bank



Aerial of Conditions on 17th Avenue Prior to TIF adoption.



FOX RIVER CORRIDOR PLAN KENDALL COUNTY, IL

FOX RIVER CORRIDOR PLAN

The Fox River is one of the greatest natural assets in northeastern Illinois, providing recreational opportunities and creating a vital environmental corridor for human activity and wildlife preservation. To maintain the river's natural qualities and properly plan for corridor enhancements, Teska Associates, Inc. worked with Kendall County and its associated townships and communities to prepare the Fox River Corridor Plan. In particular, the plan provides a focused study and set of guidelines for a segment of the Fox River Corridor located west of Route 47 and extending west to the Kendall/LaSalle County line.

A review of existing conditions and meetings with various stakeholders laid the foundation for the Fox River Corridor Plan, which outlines a series of planning and design recommendations and an implementation plan designed to prompt proactive achievement of the recommendations. Recommendations ranged from planning for a variety of river corridor users and amenities to maintenance and corridor development protection. Since the Fox River flows through the communities of Yorkville, Millbrook, and Millington, plan recommendations, particularly the location of multi-use trails, were made consistent with the plans of these communities.



The Fox River Corridor Plan encourages conservation design to protect sensitive environmental features and integrate certain features into site design, where appropriate.



Fox River Corridor Master Plan Map



Preparation of Enterprise Zone Applications Experience with Enterprise Zone Act and Application Procedures

Bedford Park, Bridgeview, Justice, Summit, IL

The existing Bedford Park-Summit Enterprise Zone has been highly successful in attracting and retaining industrial development within the two Villages. When the Enterprise Zone was scheduled to expire, the two communities joined with Justice and Bridgeview to apply for a new and expanded zone encompassing all four communities. Teska worked with the four Villages to prepare an application to the State of Illinois for re-designation of the Enterprise Zone.

Teska conducted a field inventory of all properties within the zone and collaborated with Village officials to determine an appropriate new zone boundary and labor market area. Teska prepared an eligibility summary as well as the official application in accordance with the new guidelines and eligibility criteria established by the State of Illinois. The application included demographic and economic data as well as associated maps.

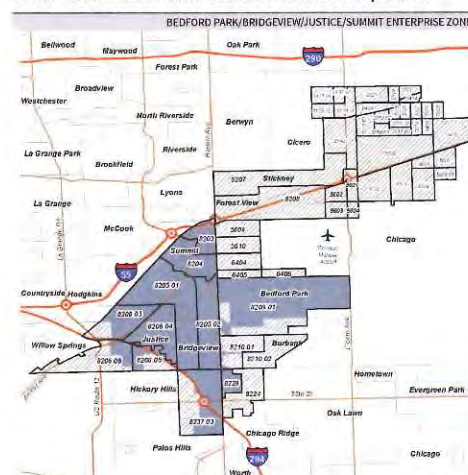
Teska coordinated the communities through a series of meetings to gather data and inform on the status of the application process, and presented the conclusions at a joint public hearing. Teska also coordinated with Village engineers and attorneys to help create the required legal description and designating ordinances. The official application was submitted to the State prior to the deadline and within budget. The State is currently reviewing applications and will award new designations by the end of 2015.

Hodgkins, McCook, IL

The Hodgkins-McCook Enterprise Zone was originally designated in 1986, and was instrumental in attracting the UPS Chicago Area Consolidation Hub, the largest package storage facility in the world. Teska worked with the Villages of Hodgkins and McCook to prepare an application to the State of Illinois for re-designation of the Enterprise Zone.

Teska conducted a field inventory of all properties within the zone and collaborated with Village officials to determine an appropriate new zone boundary and labor market area. Teska prepared an eligibility summary as well as the official application in accordance with the new guidelines and eligibility criteria established by the State of Illinois. The application included demographic and economic data as well as associated maps.

LOCAL LABOR MARKET AREA: DESCRIPTION AND JUSTIFICATION



CRITERIA #2: EMPLOYMENT OPPORTUNITIES



TAX INCREMENT FINANCING ARCHER ROAD INDUSTRIAL TIF DISTRICT

TAX INCREMENT FINANCING

The Village of Bedford Park has a small residential population and a relatively large industrial base, along with several successful existing tax increment financing (TIF) districts. Teska has been retained to prepare multiple TIFs for the Village. In this case, we were retained to evaluate a large industrial area including mostly vacant, as well as several underutilized properties, for TIF eligibility. Teska conducted field surveys, performed site evaluations, and identified redevelopment opportunities and necessary public improvements in order to document the Village of Bedford Park as a Labor Surplus Municipality, thus qualifying the Archer Road Industrial District Redevelopment Project Area as an Industrial Park Conservation Area eligible for TIF designation. The Archer Road Industrial Tax Increment Financing District was approved in October 2015.



Archer Road Industrial Tax Increment Financing District Boundary

BEDFORD PARK, IL



Location of vacant industrial property.



Vacant land suitable for industrial development



Vacant restaurant building targeted for industrial redevelopment

6 | Financials

TESKA ASSOCIATES, INC.

STATEMENT OF INCOME - INCOME TAX CASH BASIS

FOR THE YEAR ENDED DECEMBER 31, 2019

		--%--
REVENUES		
Fees received	2,511,007	90.3
Outside professional services	220,874	7.9
Other income	48,072	1.7
	<u>2,779,953</u>	
COST OF REVENUES		
Reimbursable expenses - outside professional services	252,788	9.1
Reimbursable expenses - other	52,706	1.9
	<u>305,494</u>	11.0
GROSS PROFIT	<u>2,474,459</u>	89.0
GENERAL AND ADMINISTRATIVE EXPENSES		
Administrative	8,924	0.3
Advertising	18,668	0.7
Computer	38,833	1.4
Depreciation	9	0.0
Dues and subscriptions	5,829	0.2
Insurance	163,996	5.9
Interest	500	0.0
Office	45,498	1.6
Payroll	1,752,804	63.1
Professional	3,600	0.1
Professional organizations	9,056	0.3
Rent	88,154	3.2
Repairs	9,977	0.4
Retirement plan	76,024	2.7
Sales expense	256	0.0
Seminars and education	6,279	0.2
Taxes - payroll	130,505	4.7
Telephone, internet, and website	20,630	0.7
Travel	2,413	0.1
Utilities	743	0.0
	<u>2,382,698</u>	85.7
INCOME FROM OPERATIONS	<u>91,761</u>	3.3
OTHER INCOME		
Interest	245	0.0
	<u>245</u>	0.0
NET INCOME	<u>\$ 92,006</u>	3.3

See independent accountants' compilation report



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
9/5/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER AssuredPartners of Illinois, LLC Four Westbrook Corporate Ctr Suite 500 Westchester IL 60154		CONTACT NAME: Sharon Shannon PHONE (A/C, No, Ext): (800) 894-9091 FAX (A/C, No): (630) 990-9098 E-MAIL ADDRESS: Sharon.Shannon@assuredpartners.com	
INSURED TESKA ASSOCIATES, INC. 627 GROVE ST EVANSTON IL 60201-4474		INSURER(S) AFFORDING COVERAGE INSURER A: Selective Insurance Co of Southeast 39926 INSURER B: Trumbull Insurance Company 27120 INSURER C: INSURER D: INSURER E: INSURER F:	

COVERAGES**CERTIFICATE NUMBER:** CL198117376**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY			S 1834604	8/28/2019	8/28/2020	EACH OCCURRENCE \$ 2,000,000
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR		DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000				
	<input checked="" type="checkbox"/> XCU included		MED EXP (Any one person) \$ 10,000				
	GEN'L AGGREGATE LIMIT APPLIES PER:		PERSONAL & ADV INJURY \$ 2,000,000				
	<input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						GENERAL AGGREGATE \$ 4,000,000
	OTHER:						PRODUCTS - COMP/OP AGG \$ 4,000,000
A	AUTOMOBILE LIABILITY			S 1834604	8/28/2019	8/28/2020	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	<input type="checkbox"/> ANY AUTO	<input type="checkbox"/> SCHEDULED AUTOS	BODILY INJURY (Per person) \$				
	<input type="checkbox"/> ALL OWNED AUTOS	<input type="checkbox"/> NON-OWNED AUTOS	BODILY INJURY (Per accident) \$				
	<input checked="" type="checkbox"/> HIRED AUTOS	<input checked="" type="checkbox"/> NON-OWNED AUTOS	PROPERTY DAMAGE (Per accident) \$				
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR			S 1834604	8/28/2019	8/28/2020	EACH OCCURRENCE \$ 1,000,000
	<input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE		AGGREGATE \$ 1,000,000				
	<input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 0						
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			83WECBS7594	8/28/2019	8/28/2020	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y/N <input checked="" type="checkbox"/> N	N/A				E.L. EACH ACCIDENT \$ 1,000,000
	if yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
							E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

Proof of Insurance	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE Anthony Pulgine/BKO

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INS025 (201401)



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

05/09/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER CorRisk Solutions 180 N Stetson Ave Suite 4500 Chicago, IL 60601	CONTACT NAME:	Karen Bronson	
	PHONE (A/C, No, Ext):	312-637-8755	FAX (A/C, No, Ext):
	E-MAIL ADDRESS: kbronson@corriskolutions.com		
	INSURER(S) AFFORDING COVERAGE		
INSURED Teska Associates, Inc. 627 Grove Street Evanston, IL 60201	INSURER A:	New Hampshire Insurance Company	NAIC # 23841
	INSURER B:		
	INSURER C:		
	INSURER D:		
	INSURER E:		
	INSURER F:		

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADD'L INSRD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC			DOES NOT APPLY			EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & AND INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS			DOES NOT APPLY			COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS MADE DED <input type="checkbox"/> RETENTION \$			DOES NOT APPLY			EACH OCCURRENCE AGGREGATE
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICE/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		DOES NOT APPLY			WC STATUTORY LIMITS <input type="checkbox"/> OTHER <input type="checkbox"/> E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT
A	Professional Liability			064991443-03	03/25/19	03/25/20	Per Occurrence: \$2,000,000 Annual Aggregate: \$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACCORD 101, Additional Remarks Schedule, if more space is required)**CERTIFICATE HOLDER****CANCELLATION**

FOR INFORMATIONAL/PROPOSAL PURPOSES ONLY

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

7 | References

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TESKA ASSOCIATES, INC.
MBLUE@TESKAASSOCIATES.COM
847.563.9722



VILLAGE OF BURR RIDGE

MEMORANDUM

TO: Economic Development Committee (EDC)
Mayor Gary Grasso, Chairman

FROM: Evan Walter, Assistant Village Administrator

DATE: October 7, 2020

RE: Winter Dining

At the previous EDC meeting, staff was directed to consider immediate methods for preparing restaurants for winter dining. Staff has researched this concept in conjunction with business and property owners and has returned the following recommendations:

- The Board has directed the Plan Commission to hold a public hearing to consider amendments to the Zoning Ordinance regarding the temporary expansion of indoor dining at existing restaurants. Existing regulatory language allowed staff to permit the use of parking spaces for outdoor tents on a temporary basis, but no such language exists to allow for the use of indoor spaces for temporary purposes. If these amendments are approved, they will allow restaurants (or any business if they are limited in their productive ability due to COVID-19) to temporarily expand their indoor footprint. Two such restaurants have already secured pending leases for temporary indoor expansion at County Line Square. This hearing is scheduled for October 19.
- Staff is in process of coordinating a liquor license expansion for Capri as well as issuing a new liquor license for Patti's Cafe. Patti's Cafe expressed interest in serving Bloody Mary's and mimosas as part of their brunch service after a high number of inquiries from customers were received this summer.
- Staff has met with the Village's tent company and has secured pricing for winterizing the existing tents through sturdier exterior side and roof panels. Tents are currently heated at the sole expense of the restaurants. Staff has been informed that the winter upgrades will carry a 40% premium on existing tent rentals. Staff estimates that the cost of tent rental with winter upgrades will cost the Village approximately \$75,000 if the tents are kept at Capri, Eddie Merlot's, and Falco's for the entirety of the 25-week winter dining season (November 1-May 1) on a 60/40 restaurant/Village cost sharing agreement. Patti's Cafe has stated that they would consider these upgrades but are unlikely to pursue them due to their agreement for additional indoor space. Complete tent rental costs for both restaurants and Village for the entirety of the winter dining season will exceed \$170,000 if each of the three aforementioned tents keeps their tent in place.
- Staff has identified a sanitizing vendor (Marked Safe) as a provider of sanitization services for the restaurant industry in the Village over the winter. If the Village were to perform one sanitizing routine per month for five months at the thirteen full-service restaurants, it would cost the Village approximately \$30,000 (provided all restaurants take advantage of the service).
- Staff requests feedback from the EDC regarding a possible winter marketing campaign for Village restaurants and retail businesses. This campaign would target local residents in local

publications i.e. The Doings, Hinsdale Magazine, etc. as well as via an online campaign to market Burr Ridge as one of the safest places to dine throughout the winter. Several restaurants have engaged in additional sanitization regimens (Capri, La Cabanita, Hampton Social) as well as incorporated unique distancing methods (Capri has built high-quality dividers stained dark brown to match the flooring) which create a safe dining experience without loss of atmosphere. Staff recommends that the campaign be approximately **\$20,000** to ensure that a winter-long campaign is possible and all businesses are prepared for pent-up demand in the spring. It is anticipated that a vaccine will be available on some level by spring 2021, thus allowing for potentially additional shopping and dining capacity.

- Staff has received low interest from restaurants about adding air purification products to their spaces, citing high cost of entry and educational barriers about their positive effects. In general, staff believes that members of the public are either currently comfortable with indoor dining without the presence of air purification devices or would not be comfortable with indoor dining even with the addition of air purification devices.
- Staff continues to work with restaurants about the possibility of creating all-season rooms (such as Viewpoint Enclosures' product) in 2021, primarily working to secure land agreements with property owners in preparation for eventual zoning petitions. This particular item is not intended as a winter dining strategy, but remains as a general business growth strategy that is currently pending.