ECONOMIC DEVELOPMENT COMMITTEE
WEDNESDAY, August 28, 2013 - 7:30pm
HOWARD STREET OUTPOST, 633 Howard Street

AGENDA

1. CALL TO ORDER / DECLARATION OF QUORUM

2. APPROVAL OF MEETING MINUTES OF AUGUST 7, 2013

3. ITEMS FOR CONSIDERATION
   A. Consideration of Merchant Grant for West Village Business Association

4. TOUR OF HOWARD STREET

5. ITEMS FOR DISCUSSION
   A. Financial Assistance for F.E.W. Spirits at 918 Chicago Avenue
   B. Financial Assistance for Beacon Academy

6. COMMUNICATIONS
   A. Announcements/Updates from EDC Members
   B. Real Estate Transfer Tax Report
   C. Monthly Economic Development Communication

7. ADJOURNMENT

Next Meeting: Wednesday, September 25, 2013

Order of Agenda Items is subject to change. Information about the Economic Development Committee is available at http://www.cityofevanston.org/government/special-council-committees/economic-development-committee/index.php. Questions can be directed to Johanna Nyden at 847.448.8014. The City of Evanston is committed to making all public meetings accessible to persons with disabilities. Any citizen needing mobility or communications access assistance should contact the Community and Economic Development Department 48 hours in advance of the scheduled meeting so that accommodations can be made at 847-448-8683 (Voice) or 847-448-8064 (TTY).
Attendees:


Committee Members Absent: S. Freeman, J. Grover

Staff: B. Newman, J. Nyden, C. Plante, P. Zalmezak

Presiding Member: A. Rainey

I. Call to Order / Declaration of Quorum
   A quorum being present, Chair Rainey called the meeting to order at 7:40 p.m.

II. Approval of the Meeting Minutes of June 26, 2013
   Ald. Wynne moved to approve the minutes of the June 26, 2013 Economic Development Committee meeting, seconded by Ald. Tendam.

   The minutes of the June 26, 2013 meeting were approved unanimously 8-0.

III. Items for Consideration
   Financial Assistance for *Now We’re Cookin’*
   Paul Zalmezak, Senior Economic Development Coordinator explained that the funding request is for an Economic Development Partnership Grant of $60,933 for the period from 9/1/13 – 12/31/14. The total program cost is $120,667, of which the other half is funded by *Now We’re Cookin’*. The program has conducted Food Business 101, hosted a Kellogg MBA even, partnered with CoLab Evanston and has helped businesses grow that create new Evanston retailers and employers.

   He explained the goal of integrating the NWC food entrepreneurs into the broader Evanston entrepreneurship support network. He said he and Nell Funk, founder of *Now We’re Cookin’*, will continue to collaborate.

   Nell Funk explained that she believes she will have the incubator manager position filled by the end of August 2013. She is continuing her quest to build businesses that will stay in Evanston and grow, such as the almond and crepe business that has been participating in the Farmers Market and is expanding their activities to hospital cafeteria events and dinners and potentially a storefront space. Ms. Funk explained that this proposal is about adding a manager to develop program/education resources and to market the incubator. NWC have a mailing list of 300-400 to invite to a Food Entrepreneurs Networking Session they would like to hose semi-annually or quarterly.
Mr. Zenkic requested quantitative as well as qualitative results of the funding. Mr. Zalmezak said the new manager will be working on this report. Ms. Funk added that she tracks data very specifically and will be able to provide information such as number of employees at start and end, sales data, cash/break and financing data.

Ms. Summers brought up the subject of tax dollars for the report. Chair Rainey said the report should distinguish between food sales and other. Ms. Funk confirmed that there are several categories of sales and it depends on where the company is incorporated. Ald. Fiske noted that there is no tax on wholesale foods.

Ms. Funk agreed to provide a quarterly report of client data. Mr. Zenkic advised that it would not be much different than the data she would gather for her own evaluation of results. Chair Rainey said she does not want Mr. Zalmezak to spend his time doing the report, but that the applicants/grant recipients should prepare their reports.

Ms. Nyden introduced Cindy Plante, the new Economic Development Fellow who will be in the Economic Division until the end of the year, at which time she will trade with Jonathan Williams-Kinsel, who will be in Economic Development while Cindy takes his place in the City Manager's office.

IV. Items for Discussion
   Autobarn Expansion of Operations to 222 Hartrey Avenue
Ms. Nyden introduced Richard Fisher and Richard Kirkpatrick from Evanston’s Autobarn. She presented that they are before the Committee for discussion of possible assistance that includes sales tax sharing, support from the City for application to Cook County’s 7b program, and TIF funding assistance for expansion to 222 Hartrey Avenue.

Mr. Fisher explained that the Autobarn needs to expand and proposes to use the 222 Hartrey as a state of the art service center and showroom. Mr. Fisher provided the history of Autobarn in Evanston, which opened July 1, 1992. They have evolved from a Volkswagon/Oldsmobile dealership to add Nissan and Mazda and currently sell Volkswagons, Mazdas and Nissans.

Their biggest problem in Evanston has been where to store and prepare cars. They lease space for about 600 cars off site from Mr. Robinson on Emerson Street but find they must sometimes move seven cars to get one out of the lot there. They are one of the four or five largest dealership groups in Illinois. They keep 200 cars in a warehouse in Rogers Park, 200 behind the Subaru dealership, 450-600 on Emerson and the rest on Chicago Avenue. He said owning this property could solve their space problems and those they cause their neighbors. He said he has met with Ms. Nyden, Ald. Wynne and Ald. Rainey regarding the Hartrey site. He is thinking about turning Chicago Avenue into showrooms and using the 128,000 sq. ft. at Hartrey as a service center.
Since dealers pay for exclusivity, he may have to have separate entrances at the service center. Mr. Fisher said he does have trepidation about this arrangement but 80% of his customer base lives in west or southwest Evanston; They would have to do a great job of marketing the new location and have a shuttle or have people leave their cars at Chicago Avenue if that is still convenient for them. Mr. Fisher said the Hartrey location could replace Emerson but they would still need their warehouse in Rogers Park.

The Committee discussed the options for Chicago Avenue and the requirements of the manufacturers for their showrooms. At Ald. Wynne’s inquiry, Mr. Fisher said that only about 20% of customers wait for their cars to be repaired. Mr. Fisher estimated that sales could increase by 30% with the expansion.

At Chair Rainey’s inquiry regarding the tax formula, Mr. Fisher said in the last agreement it was based on 2003 as a base year until they earned $1,400,000. Chair Rainey wondered how the City benefits when Autobarn gets the entire balance of the base amount. Ms. Nyden explained that the packet materials stated that the base year was 2003 and a reimbursement split of anything earned over $291,500.

Mr. Fisher said by continuing the partnership, the City’s half will continue to grow; the business pays a good amount of real estate taxes. Ald. Wynne noted that the new agreement would likely need to start from a new point. She said it will have to be based on a time period, not an amount. Mr. Fisher said he would be open to that. He said the sales tax sharing agreement will allow their business to grow.

The Committee considered the advantages the sales tax sharing program has provided with other businesses. Mr. Fisher asked that the City provide him with data on sales tax. Chair Rainey requested a report on whether any taxes and water bills are owed on the property and asked staff to find out whether the County required the current owner to pay any delinquent bills, in their lawsuit against the current owner. She asked for projections of what the City’s portion will be.

Ms. Summers said it is a great idea and that this magnitude of expansion makes sense and will alleviate the impact on neighbors.

Ms. Nyden explained that the next steps would be:
- A recommendation to City Council to go forward with the expansion of the TIF boundary
- Present projections of the sales to contemplate a sales tax sharing at the September meeting
- A recommendation to City Council to move forward with a resolution for 7b at the 222 Hartrey Avenue site.

Ms. Summers moved to recommend support for the 7B Ordinance, seconded by Ald. Holmes.

The Committee voted unanimously 8-0 to recommend support the 7B Ordinance.
Ms. Summers moved to recommend support of the inclusion of 222 Hartrey in the Howard/Hartrey TIF, seconded by Ald. Holmes.

The Committee voted unanimously 8-0 to recommend support of the inclusion of 222 Hartrey in the Howard/Hartrey TIF.

Regarding Mr. Zenkich’s concern about preventing misunderstandings of the public about the TIF, Ald. Wynne said there has been a press conference regarding the extension of the TIF and there will be community meetings and hearings, as well as the packet is public information and the neighbors have been made aware.

Ms. Nyden said as the project progresses, the City will provide a website to keep the public updated about the process.

V. Communications
   Announcements/Updates from EDC Members
   Ald. Holmes announced the grand opening of Jamaican restaurant Pepper Pot at 1623 Simpson, in the 5th Ward, just west of Ashland and said the food is delicious.

   Ald. Tendam noted the new nail salon in the 6th Ward on Central Street.

   Ald. Wynne announced the September 6th opening of Trader Joe’s in the 3rd Ward on Chicago Avenue and the lines forming outside of the store for job interviews. Ald. Fiske noted the Evanston murals on the inside of the Trader Joe’s. Ms. Nyden added that the Summer Youth Employment Program participants have been encouraged to apply for jobs at Trader Joe’s.

   Chair Rainey announced that there are two new bids on properties on Howard Street in the 8th Ward, the owners of The Peckish Pig on Howard Street discovered beautiful wood beam ceilings in their renovation process and that a movie is being filmed on Howard at the Police Outpost.

   Ald. Burrus noted that in the 9th Ward a new broker has taken over the property at Oakton and Asbury and there are 2 possible ideas for the space.

   Ald. Fiske announced that health food restaurant in the 1st Ward, Protein Bar is moving into the Lululemon’s former space at 1601 Chicago Avenue and that The Farmhouse is perfect for Evanston and is an amazing restaurant, and the North shore Retirement Hotel is building an addition.

VI. Adjournment
   Ald. Wynne moved to adjourn the meeting, seconded by Ald. Holmes.

   The Committee voted 8-0 unanimously to adjourn the meeting.

   The meeting was adjourned at 9:16 p.m.

Respectfully submitted,
Bobbie Newman
Memorandum

To: Chair and Members of the Economic Development Committee

From: Johanna Nyden, Economic Development Division Manager
      Meagan Jones, Economic Development Coordinator

Subject: Recommendation for the West Village Business Association application for the Evanston Great Merchants Grant Program

Date: August 20, 2013

Recommended Action:
Staff supports a recommendation to City Council from the Economic Development Committee for a Great Merchants Grant of $8,379 to the West Village Business Association for projects described in detail below. Staff recommends that the approval be contingent upon determination that planters can be accommodated in the proposed locations and in the business district.

Funding Source:
Staff is proposing to utilize the Economic Development Fund’s Business District Improvement Fund (Account: 5300.65522). The proposed 2013 Fiscal Year Budget allocated $147,000 to this account, with an allocation of no more than $72,000 to the Great Merchant Grants. As of this date, a total of $53,685 has been awarded.

Summary:
West Village Business Association requests funds for one project – the purchase of seven planters and plantings (fall and winter 2013) for the newly purchased planters. The submission was found to be complete based on the guidelines of the program. The activities are eligible by the adopted program guidelines of the Great Merchant Grant. West Village Business Association proposes to place planters at the following commercial locations: the intersection of Dodge Avenue and Dempster Street (4); Dempster Street and Darrow Avenue (2); and Lake Street and Ashland Avenue (1). As has been done with other merchant groups and large planters, the City’s traffic engineer will need to approve the proposed locations to ensure that there is sufficient passing space for pedestrians and line of sight for vehicles.

Staff recommends approval of $8,379 to the West Village Business Association for the purchase of 7 concrete planters and two seasonal plantings (fall and winter 2013) contingent upon determination that planters can be accommodated in the proposed locations and right-of-ways.
The submitted application and supporting documentation is attached immediately following this memorandum.

**Attachments:**
- Application
- Membership List
- Project Quotes
- Documentation of how 2011 Merchant Grant funds were spent.
Application for Evanston's Great Merchants Grant 2013

Applicant Information

Name of Business Association: West Village Business Association

Name of Point of Contact: Nancy Floy - President

Address: Heartwood Center 1818 Dempster

Phone: 847-491-9163 x 11

Email: nancyfloy@heartwoodcenter.com

Business District

How many businesses are located in your business district:

Non-Association businesses: 85  Members: 23

Attachment A: Attach a current membership list.

Describe the geographic area that your business district serves:

The West Village Business Association is bounded by the following streets:
   East side of Dodge Ave. (on the west)/Wesley St. (on the east)
   Lake St. (on the north)/Lee St. (on the south)

*please note that the Evanston Plaza is not within the current boundaries of the WVBA. Most of the businesses in the plaza who are in an association affiliate with the West End Business Association.

Does your group collect association dues for memberships? ☒ Y ☐ N

What is the amount collected annually from members? $25.00

Please list other ways that businesses may attain membership (i.e. in-kind services for membership):

Bartering and in-kind contributions are accepted in lieu of association fees when requested and appropriate

How much money is your group requesting from the City of Evanston for the remaining fiscal year (through December 31, 2011)? $8,379.00
Please provide a description of proposed programs, projects, and activities for your association.

<table>
<thead>
<tr>
<th>Amount Requested</th>
<th>Is this vendor located in Evanston?</th>
<th>Is this a &quot;bulk&quot; purchase with another association?</th>
</tr>
</thead>
<tbody>
<tr>
<td>$8,379.00</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

7 concrete planters with seasonal plant rotation to be placed at the intersection of Dodge/Dempster (4); Dempster/Darrow (2); Lake/Ashland (1); Fall and Winter rotations are included in this grant cycle proposal. (3 bids attached)

WVBA prefers to work with local vendor Natures Perspectives as our community has a long and successful history with this company.

If you are "bulk" purchasing anything with another business association, please complete the table below:

<table>
<thead>
<tr>
<th>Name of &quot;bulk&quot; items/projects/programs/activities</th>
<th>Which organization/individual will be taking the lead on this activity?</th>
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</tbody>
</table>
If you checked "No" for vendor location in Evanston, please provide an explanation as to why you are not proposing to use an Evanston vendor.

Attachment B: Include any additional description or materials for how funds will be utilized.

**Past Neighborhood Business District Funding Awards**

Please list sources of revenue for your association in the previous years.

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue from Dues</th>
<th>Description of Revenue from other sources</th>
<th>Amount of Revenue from other sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>$425.00</td>
<td>Dues were collected in 2012; dues for 2013 have not yet been solicited Revenues from sponsorships and artist registrations for Making It Happen Event</td>
<td>$2,088.00</td>
</tr>
</tbody>
</table>

If funds were awarded in 2010, were all funds spent? □ Y □ N

If not, why were all funds not expended?

Great Merchant Grant funds were awarded in 2011 and the majority of the funds were expended during that fiscal year.

Provide a summary of how funds were used in the past fiscal year and direct measurable impacts these funds had on business district activities.

The primary activity of the fledgling West Village Business Association was the two day art/music event called "Making it Happen" held in May 2011 in the Evanston Plaza. $4518.00 was spent on this festival (budget for festival attached) $550 was used for attorney fees for the process of incorporation and filing for the non-for-profit status for the WVBA (invoice attached) $3100 was spent on the creation of the West Village Business Association website with an additional $1800 set aside for maintenance and hosting the site into the future.

The impact of the website has been to increase visibility and recognition of the many home-based and storefront businesses in this quadrant of the community. The two day event also brought residents from all over Evanston to the area of our city that is often passed over in favor of more active and visible districts in the city.

Both activities were the beginning of work by business residents of the area to revitalize and rebrand this area of Evanston in order to enhance its image and increase the flow of business traffic in the business community.
**Public Benefits**

Will the programs or projects proposed this year help retain/expand existing Evanston businesses?  

If yes, please specify which program/project and describe how it will help retain/expand existing businesses:

The landscaping project will place 7 beautiful concrete planters with seasonal plantings in strategic corners at the gateway into this business district. This project is the beginning of what the WVBA board hopes will be an ongoing process of beautification of this business area. The beauty of plants will help to esthetically enhance the corners of Dodge/Dempster; Dempster/Darrow which are heavily visually impacted by fast food, cash station and pay day loan type businesses which boast an abundance of flashing signs with little to invite travelers to stop and explore the many businesses that exist beyond this intersection. At this gateway to our business community we want to create a more appealing image that is family and business friendly and to help transform a long held perception that this business community is only filled with junk food, empty store fronts and businesses willing to charge high interest rates to residents in need of funds. We want to begin to inform the public of all the creative, innovative businesses in this area such as the art galleries, health and wellness businesses; book publishers, newspaper offices, writers, sculptors, printing companies, hair stylists, architects, construction companies, realtors, dog walkers, musicians, web designers, taxi companies, framing shops and much more. The West Village is more than Dodge-Dempster, but that is our entry way and needs to be more inviting!

Will the programs or projects proposed this year include any attraction efforts to bring new businesses to your district?  

If yes, please specify which program/project and describe how it will help to attract businesses:

The visual enhancement will hopefully help attract new businesses as well as shoppers to this district. The improved website which is now maintained and hosted by HNH Chicago - a local business in our area will help increase awareness of who we are and what business adventures are waiting to be explored in the West Village.

Describe project program outcomes not otherwise described above. Specifically, applicants should identify the desired outcome associated with funding.

Shoppers want to shop in an area that is pedestrian friendly, visually pleasing and safe. The corner of Dodge and Dempster has struggled for many years as a business area which has not met that criteria - for a variety of complex reasons including a partially empty shopping mall whose past, present and future viability is questionable. As a result our business district has not been a destination shopping location for Evanston residents or others coming into Evanston who often must travel directly through the Dodge-Dempster intersection on their way to other business areas which are perceived in a more favorable light. We are committed to changing this and to seeing this eclectic and interesting business district become more inviting and visible to more than the residents and businesses who live and work here and appreciate the hidden wealth and treasure that the West Village actually is. We hope to partner with the city in their plans to also create change in the Dodge corridor from Lake Street south which we understand has been proposed. The Great Merchants Grant can give us an immediate jump start on our goals to bring visual and much deeper change to the area immediately.

Describe deliverable and/or proposed criteria for monitoring outcomes to track the relative success of the program (i.e. measurable increases in sales, total number of visitors to the district, etc.)

Survey responses to the beautification project by visitors to the area (such as the 500-700 weekly clients of the Heartwood Center) will be one tool of measurement - albeit subjective. Businesses within the WVBA will be surveyed as well through the year to gauge whether their businesses have experienced an increase in traffic. The updated and enhanced website will be used on other social media sites to drive traffic but mostly raise awareness of the hidden, unseen treasures that exist within the West Village. The host of the homepage will monitor the number of hits that the site gets on a weekly basis.

If you have any questions regarding this application, please contact the Division of Economic Development at (847) 448-8100 or economicdevelopment@cityofevanston.org.
West Village Business Association Members- 2013

Brown Dog Antiques
1019 Florence Ave.

Mar-Toy Building and Realty Co.
1019 Dodge Ave.

C.J.B. Associates
1124 Florence Ave.

Fonda and Associates –Psychotherapy/Consulting
1220 Darrow Ave.

Commitment to Healing/Hubbard
1818 Dempster Ave.

Defining Moments
1124 Florence Ave.

Graceful Strength Massage/Rosenberg
1818 Dempster Ave.

Perla Café
1813 Dempster Ave.

Heartwood Center for Mind, Body, Spirit
1818 Dempster Ave.

Rockwell And Associates/Artchitects
1124 Florence Ave.

Building Vision
1129 Florence Ave.
Just Builders
1228 Florence Ave.

Zigmil Inc.
1124 Florence Ave.

Space 900/Artists Collective/ Pinksy
1042 Wesley Ave.

Mixed Masters/George
1404 Greenleaf Ave.

Donovan Mixon-Music
1042 Wesley Ave.

Bucephalus Bikes
1424 Lake St.

Artists Seeds/King
1404 1/2 Greenleaf

Black Mountain Designs/Zarko Theatre
1608 Crain St.

Sugar Creek Folk Art/Simmons
1220 Darrow Ave.

Montenegro Illustrations/Children’s books
1608 Crain St.

HnH Chicago /Printing
1800 Dempster Ave.

The Evanston Round Table
1124 Florence
NATURE'S PERSPECTIVE LANDSCAPING, INC.
2000 Greenleaf Street, Evanston, Illinois 60202
(847) 475-7917 Fax (847) 475-7975
www.naturesperspective.com

Proposal/Contract 8/12/2013

Proposal Submitted To:
Dickelle Fonda
1220 Darrow Ave
Chicago, IL 60202
847-491-9748

Work to be Perform at:
West Village Planters
West Village Corners and Planters
Chicago, IL 60202

SugrCreek@aol.com

NATURE'S PERSPECTIVE LANDSCAPING, INC., the "Contractor", hereby proposes to furnish all the materials and perform all the labor necessary for the completion of the following described work:

<table>
<thead>
<tr>
<th>Description</th>
<th>Price Each</th>
<th>Total</th>
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<tbody>
<tr>
<td><strong>PLANTERS</strong></td>
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<tr>
<td>7.00 EA Commercial Planters</td>
<td>$937.00</td>
<td>$6,559.00</td>
</tr>
<tr>
<td>- Commercial Grade Concrete Flower Planter 36&quot; dia. with sandblasted brick red finish and seal coated for all weather protection. Installed with water reservoirs. Planter will be set in place and filled with soil.</td>
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<tr>
<td>- 4 cubic yards of soil (garden mix)</td>
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<tr>
<td>- Location of planters to be placed (4) Dodge Ave &amp; Dempster Street corners, (1) at Lake and Ashland by the bike shop (2) at Dempster and Darrow</td>
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<tr>
<td><strong>SEASONAL ROTATIONS</strong></td>
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<td></td>
</tr>
<tr>
<td>1.00 EA Annuals Flowers</td>
<td>$1,820.00</td>
<td>$1,820.00</td>
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<tr>
<td>- (2) Seasonal Arrangement Fall</td>
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<tr>
<td>Plant seasonal containers to create a &quot;premium display&quot; utilizing accents of Kale, Cabbage, Swiss Chard, Ajuga, Mums, Ornamental Grasses, Vinca, Lysimachia, and other fall accents.</td>
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<tr>
<td>Winter</td>
<td></td>
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<tr>
<td>Plant seasonal containers to create a &quot;premium display&quot; utilizing accents of Evergreen Boughs, Pussy Willow Tips, Winter berries, and Eucalyptus Pods.</td>
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Total: $8,379.00

Comments: Above prices include all labor for installation, taxes and delivery unless otherwise noted.

Any deletions, additions, or other changes to your proposal and/or plan may affect pricing and will need to be re-quoted. A minimum re-stocking fee of 25% will be charged for all special order items, or for items brought to the job site and not used due to customer initiated changes. If items are custom made they will be charged at 100% Above prices are based on complete proposal. Deletions, additions, or other changes to this proposal may affect prices and will need to be re-quoted. Specific time of day work requests must be made at least 48 hours in advance of work.
NATURE'S PERSPECTIVE LANDSCAPING, INC.
2000 Greenleaf Street, Evanston, Illinois 60202
(847) 475-7917 Fax (847) 475-7975
www.naturesperspective.com

Proposal/Contract
8/12/2013

Proposal Submitted To:
Dickelle Fonda
1220 Darrow Ave
Chicago, IL 60202
847-491-9748

Work to be Performed at:
West Village Planters
West Village Corners and Planters
Chicago, IL 60202

Suqrcreek@aol.com

NATURE'S PERSPECTIVE LANDSCAPING, INC., the "Contractor", hereby proposes to furnish all the materials and perform all the labor necessary for the completion of the following described work:

All material is guaranteed to be as specified, and to be performed in accordance with the drawings submitted for above work and completed in a workmanlike manner for the sum of $8,379.00 with payments to be made as follows: 50% on acceptance, remainder on completion, 10 days net. NOTE: Credit/Debit cards are not accepted.

Any alteration or deviation from above involving extra costs will be executed upon verbal or written orders, and will become an extra charge over and above the quoted price. This proposal is contingent upon strikes, accidents or delays beyond our control. Contractor will carry and keep in force public liability and Workman’s Compensation insurance in amounts desired by contractor. Owner will provide fire, tornado and all other insurance coverage necessary or desired by Owner, at Owner’s expense. The General Conditions, as attached, are expressly incorporated into this agreement.

For paving work, customers must select paver type, color, pattern and edge detail prior to scheduling and approve layout prior to commencing excavation. Walkway and patio base to be four inches of crushed compacted gravel with one inch torpedo sand leveling course. Edges retained with concealed edging. All brick paver work guaranteed by Nature’s Perspective Landscaping Inc. for three years against settlement on undisturbed soil. Concrete pavers carry manufacturer’s lifetime guarantee against breakage.

Nature’s Perspective will contact J.U.L.I.E. and assume responsibility for all J.U.L.I.E. MARKED underground cable and lines. If we cut a marked line, we are responsible for its repair. Nature’s Perspective is not responsible for cutting or damaging any UNMARKED buried lines, cable or satellite TV, modem, water, electrical, gas, sprinkler lines/heads, or any buried object that is not identified, marked, and located.

Respectfully Submitted:
Nature’s Perspective Landscaping, Inc.

By: Barbara Schwarz

Note: This proposal may be withdrawn by us if not accepted within 15 days.

ACCEPTANCE OF PROPOSAL

The above prices and conditions are satisfactory and are hereby accepted. I accept the General Conditions on the back of this contract or that have been attached in an email or fax. You are authorized to do the work as specified.

My acceptance of the proposal constitutes this as a valid and binding Agreement.

Dated: ____________________________
Signature: Owner

I am fully aware that I may rescind this contract within 3 days.
I am fully aware that failure to make payment of final notice within 30 days of receipt shall invalidate limited warranty.

15 of 73
**Purchaser**

WEST VILLAGE BUSINESS ASSOCIATION  
ATTN: DICKELLE FONDA  
1818 DEMPSTER ST.  
EVANSTON, IL 60202

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**Job Number**: 1L-159759  
**Contract Date**: 8/5/13  
**Designer**: LJ  
**Phone**: 847.491.9748  
**Cust #:**: 105023  
**Page**: 1 of 1

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**Estimate for (7) 36" Containers with Fall and Winter Change Out**

<table>
<thead>
<tr>
<th>Items</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit</th>
<th>Price</th>
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<tbody>
<tr>
<td>7 G</td>
<td>36&quot; Concrete Containers</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 CHALET-40QT</td>
<td>SOIL, CHALET 40 QUART BAG</td>
<td>1</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>LABOR and material to remove debris from containers and, if necessary, fill with soil. Install fall flowering plants, feed and water in. Remove debris made by us, job supervision included.</td>
<td>1</td>
<td></td>
<td>1325.00</td>
</tr>
<tr>
<td></td>
<td>LABOR and material to remove debris from containers and, if necessary, fill with soil. Install evergreen stems, cut stems and other live material with winter interest. Spray with antidesiccant to help prolong freshness. Remove debris made by us, job supervision included.</td>
<td>1</td>
<td></td>
<td>1675.00</td>
</tr>
<tr>
<td></td>
<td>FUEL</td>
<td>1</td>
<td>CLEAN AIR AND FUEL SURCHARGE</td>
<td>60.00</td>
</tr>
</tbody>
</table>

**Material Total**: 5,064.82  
**Taxable Total**: 5,064.82  
**Tax**: 354.54

**Total**: 8479.36

If more/less material is needed, a charge/credit will be issued.  
Permit fees are not invoiced in this proposal. If permit fees are incurred, they will be invoiced as an extra charge.  
This proposal is subject to all of the additional terms and conditions set forth on the reverse side. All prices are subject to change if not accepted within (30) days of the above date. No work shall be scheduled until this is accepted with the authorized signatures.

**Dated this__________________ day of__________________, 20________________**  
**BUYER:**  
______________________________  
**SELLER**: L. J. THALMANN CO. DBA CHALET ETAL  
______________________________  
**BY:**
Options:
Note: Options may change without notice.
Call to confirm current options.

Exposed Aggregate:
Tan w/Gray Matrix - Tan w/Brown Matrix
Tan w/Sand Matrix - Misty Gray w/Gray

Weatherstone:
Sand - Gray - Brown - Buff - Cream
Light Charcoal - French Gray - Brick Red

Granitex (GTX)
2078F, 4028F, 6208F, 1168F, 2098F
Custom Options Available

Size: 36" Dia. x 30' H.
Weight: 885 lbs.
Material: Reinforced Precast Concrete.
Wall Thickness: 2-1/2' at the top with a 2% pitch.
Features: Top edge and reveal line is smooth concrete
when planter is exposed aggregate. A smooth
top edge and reveal line must be specified when
ordering weatherstone finishes. GTX finish is fully
exposed.

Reservoir System: Available upon request.
Reinforcing: 1/4" Dia. steel rebar.
Hardware: (4) - 1/2" Dia. threaded inserts.
(2) - 5/8" Dia. lifting inserts.
Drain Hole: (1) - 1 1/2' Dia.
Anchoring: Optional.
Maintenance: Rinse periodically with water & mild detergent.
Re-seal annually.
Packaging: Banded to pallet.

*NOTE:
Lifting inserts are to ONLY be used when the planter is EMPTY.
1.1 SUMMARY
A. Section includes: Furnish Precast Concrete Planter indicated on drawings or specified herein.

1.2 REFERENCES
A. American Society for Testing & Materials
   1. ASTM C33  2. ASTM C150  3. ASTM C31

1.5 SUBMITTALS
A. Submit product data, shop drawings and Samples.
   1. Product Data: Manufacturer's specifications and technical data
      edited specifically for proposed system, including the following
      specific information:
         a. Detailed specification of construction fabrication.
         b. Manufacturer's installation instructions
         c. Maintenance literature
         d. Product warranty
   2. Shop Drawings: Indicate pertinent dimensions, general
      construction, component connections anchoring methods,
      hardware and installation procedures.
   3. Samples as requested by Architect.

1.6 QUALITY ASSURANCE
A. Qualifications of Manufacturer: Manufacturer to be prequalified by
   specifier prior to bidding. Failure to comply will result in
   disqualification of bid. Manufacturer to have at least five
   years experience in the manufacture of precast concrete planters
   field proven for at least five years.

1.10 WARRANTY
   Manufacturer shall submit a written warranty for precast products for the
   period of two years upon acceptance of products.

2.1 MANUFACTURERS
A. Acceptable manufacturer for Precast Concrete Planters to be known as
   Wausau Tile, Inc. Terra-Form Division.
   PO Box 1520, Wausau, WI 54402-1520.
   (800) 388-8728  FAX (715) 355-4627
B. Clarification Note: Drawings and installation specification are based
   on manufacturers proprietary literature from Wausau Tile, Inc.
   Other manufacturers shall comply with minimum levels of material
   and detailing indicated on drawings or specified herein.
C. All Precast products for this project shall be of one manufacturer.

2.2 MATERIALS
B. Aggregates: All aggregates to meet ASTM C33 specifications, to be
   cleaned of foreign matter and properly graded to size.
C. Coloring: Pigments used shall be inorganic, resistant to alkalinity and
   used as per manufacturers recommendations.

#    #    #
WEST VILLAGE BUSINESS ASSOCIATION

Evanston, IL 60202

DESCRIPTION OF WORK TO BE PERFORMED
Seasonal Color with Cement Pots

This is an agreement between Landscape Concepts Management, Inc., 31745 N Alleghany Rd., Grayslake, IL 60030, and West Village Business Association ("Client"), Attn: Dickelle Fonda, 1220 Darrow Ave, Evanston, IL 60202.

SEASONAL COLOR CONTAINERS

Landscape Concepts Management proposes to install 7 - 36" concrete pots in weatherstone brick red to your site:

- Installation includes the container, potting medium/drainage and delivery to the site.
- Flowers are not included.

Please note: Delivery of the pots is going to take 8 weeks from the time the proposal is accepted

Prices subject to change after 2 weeks

WINTER COLOR

Location: Pots located on Dempster and Dodge and Dempster and Darrow

Install winter color to 7 - 36" pots

Winter Color: Winter color is a mixture of evergreen boughs installed in annual beds where the previous seasonal annuals have been removed. Along with evergreen boughs, specialty beds contain berries, branches and displays of mixed greens to add pops of seasonal color and provide added winter interest in key focal areas. Accent items such as glittered and painted branches, colored eucalyptus, specialty winter accents, and berries have been added to our product line. The sky is the limit when it comes to creating unique specialty displays for both beds and containers.
2013 CONTRACT SUMMARY

<table>
<thead>
<tr>
<th>INCLUDED SERVICES</th>
<th>TOTAL COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEASONAL COLOR CONTAINERS</td>
<td>$7,215.00</td>
</tr>
<tr>
<td>WINTER COLOR</td>
<td>$1,785.00</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>$9,000.00</td>
</tr>
</tbody>
</table>

**General:** All services to be performed by trained, properly supervised personnel in accordance with accepted horticultural practices. Materials shall be applied at manufacturers recommended rates. The environmental impact of alternate products shall determine which is used. Sufficient personnel and equipment shall be provided to complete all operations in a timely fashion. Clean up (policing) of entire site to remove miscellaneous accumulated debris, branches, leaves, etc. Policing of the grounds will be part of every visit by a maintenance crew. Certificates of insurance will be provided upon request. We carry Worker’s Compensation and Occupational Disease Insurance, General Liability Insurance and Auto Liability Insurance. All water shall be provided by the owner with adequate silcox and/or hydrants provided. LCM will assume the responsibility for contacting the local utility location services for underground line locations. We cannot, however, be held responsible for any sub-surface lines which are not normally located and may not be buried to specification (at least 6”). These would include, but are not limited to, invisible dog fences, cable TV, security lines, irrigation or lighting systems, gas barbecue lines, and pool equipment lines.

**Payment Schedule:** Invoices shall be submitted by LCM identifying each service performed and any additional authorized expenses on a monthly basis, and terms shall be net fifteen (15) days. Billing periods will be monthly, at the beginning of each month in which the service is performed. Balances unpaid after thirty (30) days from date of invoice are subject to a late payment charge of 1.5% per month. Customer shall pay LCM’s reasonable attorneys fees, expenses and costs incurred in collection of any outstanding invoices or enforcing any of the provisions of this Agreement, regardless of whether a legal action is initiated. Jurisdiction for any issue litigated under this contract shall be in Lake County, Illinois.

**Thirty Day Cancellation:** The contract may be terminated by either party, upon thirty (30) days prior written notice to the other party.

**Acceptance:** Acceptance of this contract constitutes a full review and approval of the attached specification sheets by the site owner and/or its designated agent.

**Disclaimer:** LCM will not be responsible for delays due to circumstance beyond our control. This includes strikes, labor disputes, fire, changes ordered in the work, unavoidable casualties, or acts of God.

This proposal supersedes any previous proposals. Unless specifically agreed to by West Village Business Association, the terms, including prices, contained in this proposal are subject to renegotiation after two (2) weeks from the submitted date of proposal. After 14-days, you must contact LCM. If acceptable, please initial the payment schedule, and sign below.

By [Signature]
Jesse E Bozman 002673

By

Date August 13, 2013

LANDSCAPE CONCEPTS
MANAGEMENT, INC.

Landscape Concepts Management, Inc. • 31745 N Alleghany Rd. • Grayslake
IL 60030
2011 “Makin’ It Happen...” Festival Budget

**EXPENSES**

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Grotto Communications (press releases)</td>
<td>$200.00</td>
</tr>
<tr>
<td>2. Flyers &amp; Post cards</td>
<td>$100.00</td>
</tr>
<tr>
<td>3. Banners (2) - mat’l cost only</td>
<td>$200.00</td>
</tr>
<tr>
<td>4. Posters – mat’l cost only</td>
<td>$200.00</td>
</tr>
<tr>
<td>5. Tent – 30’x60’</td>
<td>$1,110.00</td>
</tr>
<tr>
<td>6. Stage – 16’x24’</td>
<td>$600.00</td>
</tr>
<tr>
<td>7. Sandbag (10) &amp; 2 sides (40)</td>
<td>$50.00</td>
</tr>
<tr>
<td>8. Labor – stage installation</td>
<td>$120.00</td>
</tr>
<tr>
<td>9. Tables (6’) x 12</td>
<td>$102.00</td>
</tr>
<tr>
<td>10. AM-FM/CD-DVD/IPOD Stereo</td>
<td>$40.00</td>
</tr>
<tr>
<td>11. PA, 10’ Red/White-RCA Karaoke</td>
<td>$5.00</td>
</tr>
<tr>
<td>12. Concrete drop anchor, screw</td>
<td>$72.00</td>
</tr>
<tr>
<td>13. HOME – Del. &amp; P.U.</td>
<td>$60.00</td>
</tr>
<tr>
<td>14. Popcorn maker (table top)</td>
<td>$0</td>
</tr>
<tr>
<td>15. Popcorn supplies (200)</td>
<td>$82.50</td>
</tr>
<tr>
<td>16. COTTON CANDY MAKER</td>
<td>$0</td>
</tr>
<tr>
<td>17. Cotton Candy Supplies (100)</td>
<td>$28.50</td>
</tr>
<tr>
<td>18. Helium Valve (5) &amp; Tank (98)</td>
<td>$103.00</td>
</tr>
<tr>
<td>19. Labor Cleaning</td>
<td>$50.00</td>
</tr>
<tr>
<td>20. Labor Time Specific P.U.</td>
<td>$60.00</td>
</tr>
<tr>
<td>21. Insur. for China Buffet space</td>
<td>$25.00</td>
</tr>
<tr>
<td>22. Rental for China Buffet space</td>
<td>$50.00</td>
</tr>
<tr>
<td>23. Cleaning Services (doors, bathrooms, windows)</td>
<td>$160.00</td>
</tr>
<tr>
<td>24. Staff food (catered sandwiches)</td>
<td>$100.00</td>
</tr>
<tr>
<td>25. Project Planning Fees (Testa)</td>
<td>$1,000.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$4,518.00</strong></td>
</tr>
</tbody>
</table>

**REVENUES**

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Table Registration ($50 x 20 businesses) - collected amt</td>
<td>$1,155.00 $(1,463 also reported?)</td>
</tr>
<tr>
<td>2. Popcorn Sales</td>
<td>$58.00</td>
</tr>
<tr>
<td>3. Sponsorships - &lt;Collected&gt;,(Pledged)</td>
<td>$&lt;875.00&gt; ($1,375)</td>
</tr>
<tr>
<td>a. Dominicks</td>
<td>$75</td>
</tr>
<tr>
<td>b. First Bank</td>
<td>$500</td>
</tr>
<tr>
<td>c. Kiwanis</td>
<td>$200</td>
</tr>
<tr>
<td>d. Ev. Comm. Fdn.</td>
<td>$500 (collected?)</td>
</tr>
<tr>
<td>e. Spex</td>
<td>$100</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$&lt;2,088&gt; ($2,588)</strong></td>
</tr>
</tbody>
</table>

**IN-KIND DONATIONS**

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Face Paint mat’ls</td>
<td>$40.00</td>
</tr>
<tr>
<td>2. Indoor Space prep (electricity/water) by Foresite</td>
<td>$</td>
</tr>
<tr>
<td>3. Coupon Book</td>
<td>$100.00</td>
</tr>
<tr>
<td>4. Balloons</td>
<td>$90.00</td>
</tr>
<tr>
<td>5. Powerade/Fuze Truck (Fri -40 cases)</td>
<td>$600.00</td>
</tr>
<tr>
<td>6. Planters (Nature’s Perspective Landscaping)</td>
<td>$</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>**      **</td>
</tr>
</tbody>
</table>

22 of 73
Law Offices of C. Shawn Jones  
1114 Monroe St, Suite 200  
Evanston, IL 60202  
(773) 290-3368  
FAX: (847) 563-8361

August 29, 2011  
Invoice Number: 1018

Bill Holloway  
Treasurer  
Evanston West Village Business Association  
1800 Dempster St  
Evanston, IL 60202

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Hours</th>
<th>Rate</th>
<th>Tax</th>
<th>Total</th>
</tr>
</thead>
</table>
Form the Evanston West Village Business Association with the Illinois Secretary of State;  
obtain a federal tax ID number (EIN) for the Association. | 1.25  | $100.00 | $0.00 | $125.00 |
State of Illinois filing fee for formation of the Association. |       |        |       | $50.00  |
| 8/19/2011 | Meet with business association.  
Meet with the business association to discuss use of City funds and corporate bylaws. | 1.00  | $100.00 | $0.00 | $100.00 |
| 8/21/2011 | Prepare bylaws.  
Prepare Evanston West Village Business Association bylaws and related documents. | 1.50  | $100.00 | $0.00 | $150.00 |
| 8/24/2011 | Finalize bylaws and related documents.  
Finalize bylaws and related documents; meet with board of directors to discuss and adjust bylaws based upon the decisions of the Board. | 1.25  | $100.00 | $0.00 | $125.00 |
| Amount Due |                                   | 5.00  |        |       | $550.00 |

Thank You! - Balance is due within 30 days.  
Interest of 1.5% per month may be added to unpaid balances
To: Chair and Members of the Economic Development Committee

From: Johanna Nyden, Economic Development Division Manager

Subject: Discussion of Financial Assistance for FEW Spirits LLC

Date: August 23, 2013

Background:
FEW is a craft distillery founded in 2010 in Evanston, by local resident Paul Hletko, that specializes in the production of Whiskey, Bourbon, Rye, and Gin products. Since first opening a little more than three years ago, FEW’s distribution has grown to across the United States to the United Kingdom, Japan, and Australia. The tasting room, an accessory use to the distillery at 918 Chicago Avenue, has attracted visitors to Evanston from across the world.

Tours of craft-distilleries are an increasing tourist activity. Earlier this summer, the Daily Meal, a popular food and travel website, published a list of the top 25 Craft Distillery tours in the United States (http://www.thedailymeal.com/25-top-craft-distillery-tours-us-slideshow). FEW was named #9 in the list of this top 25 list. According to a presentation developed for Illinois Travel Professionals by the state’s Department of Commerce & Economic Opportunity, tourists spend $100 per day (http://illinoistourism.org/pdfs/2013_Road_Show.pdf). Currently FEW experiences a total weekly visitor count between 60 and 90 people per week to the distillery at 918 Chicago Avenue. If 25 percent of those visitors were from out of town, it could be estimated that between 1,500 and $2,250 is spent per week in the local economy (assumes a trip for a tour counts as one day of spending for a tourist) with a potential annual impact between $78,000 and up to $117,000 per year. FEW recognizes that this is an important segment of the market to attract to the distillery and is in the process of making improvements to business operations to increase marketing of FEW.

Based on the narrative provided by FEW (attached to this memorandum), the company currently considers itself as being located on “middle ground” in regards to ability to expand to meet a demand but financially constrained to support such expansion. Given the success of the product in its early stages and high demand for craft products, FEW has had difficulties meeting the demand. To address this challenge in the short term, FEW has hired additional marketing and production employees, has relocated the barrels to an off-site location that can be utilized to complete the liquor aging process,
and has plans to acquire new equipment to meet the growing production demands. However to grow and function at a larger capacity and meet the growing demand for this craft product, FEW needs to add a new production line and capacity to distill additional alcohol.

The relocation of the barrels to an off-site location has resulted in increased availability of space to install an additional still and bottling line. This additional still and bottling line will result in increased production to serve markets that seek FEW as well as potentially introduce smaller bottles to FEW’s product offerings.

Typically, businesses seek initial funding to finance a start-up business or other initial business expenses. Banks often lend for expansions because businesses can offer historical evidence of positive growth and profits. As a high growth startup company, FEW does not have the financial history to qualify for loans under the current private lending market. Therefore, FEW seeks a loan in an amount up to $250,000 from the City to finance the purchase of the still and bottling equipment as well as to continue to support the operations of marketing FEW worldwide.

**Potential Funding Source:**
The loan for FEW spirits could be funded through the Economic Development Fund’s Business Attraction/Expansion and Investment Fund (Account # 5300.62660). The FY 2013 budget allocated $500,000. To date, $16,066 has been spent from this fund.

**Next Steps:**
If the Economic Development Committee provides feedback on the proposed project, a request for funding would return at the next appropriate meeting of the Economic Development Committee to review for a recommendation to City Council for funding.

**Attachments:**
- Submission from FEW
Company Description

FEW Spirits, LLC. (“FEW”) is an Illinois Limited Liability Company created in 2010 to start a craft distillery in Evanston, Illinois, with the goal of producing Bourbon, Rye, and Gin products.

Company Update

FEW had a good year in 2012 and made a lot of progress on setting a solid base for long-term growth and success. We grew from a strong base in Illinois, to opening markets across the country and even internationally in the UK. Our focus on quality continues to shine through, as we won silver medals in the San Francisco International Spirits Competition and the Beverage Tasting Institute among others. Our Barrel Aged Gin is currently the highest rated gin in the world. FEW American Gin was named the most exciting new product introduced in the United Kingdom in 2012. We continue to invest in long-term growth in the business and installed new fermenters in the summer and installed a new still in January 2013.

In particular, during 2012, FEW was available in Illinois, Wisconsin, New York, California, Tennessee, Wisconsin, Michigan, Oregon, Washington, the District of Columbia, Minnesota, and Colorado in the US, plus British Columbia, and Alberta in Canada. We also made arrangements for Japan and Australia although we did not ship to those markets until 2013. We also started the process to ship to China and we are close to sending our first product shipment there.

We are routinely mentioned among the cream of the crop of small craft distilleries and the press continues to seek us out. In 2012, we were featured in several press outlets, ranging from the Huffington Post, to Entrepreneur Magazine, the ABA Journal, Chicago Tribune, and more.

Industry Update

The Craft Distilling industry and market is experiencing enormous growth, not unlike that of the micro brewing industry in its infancy. The number of new entrants to the market is doubling every three years. By the end of 2013, every state will have an operating Craft Distillery. This is compared to 12 states in 2000, 25 in 2005, and 45 at the end of 2011. Craft Distilling is experiencing growth and interest that matches that of early micro brewing and it is our expectation that it will continue to expand for the foreseeable future.
Growth and Expansion

Currently, FEW is in a middle ground space that makes it very challenging to move forward due to financial constraints. We have far more demand than we have product for and far more market expansion opportunities than we can possibly meet. To address these challenges, we are in the process of adding an additional location in Evanston, we are hiring additional marketing employees, we are hiring additional production employees, and acquiring new equipment to meet the production demands. More specifically we have hired a new Brand Manager and two additional production staff, all of which will be based in Evanston. We are looking to hire two additional mid-level marketing people in the near future that will support the tasting room and the Illinois market.

With the addition of the Tasting Room Manager as one of the marketing positions, we are looking to grow the tasting room by five times over the next three years. With our new space, we will be able to create a much better customer experience at our 918 Chicago Ave location. This will allow us to host additional events, host additional tours, and sell additional product through the tasting room; all while enhancing the customer experience. This is a big resource for us that is currently being under utilized. We have 50 plus people walk through the tasting room every week from all over the globe, the plan is to give them a far better experience and increase their numbers.

The core challenge is production capacity and the availability of aged product. We are under delivering about 50% of our current orders and we have distributors that want us in Sweden, Hong Kong and other states throughout the United States. This is in addition to the already high demand from our current distributors.

In order to better serve and continue to grow FEW we need to add two pieces of equipment to our production, an additional still and a bottling line. These additions will allow us to serve our current demand as well as go into a few other highly visible markets. The challenge is around financing this additional growth.

Local Impact

FEW has been pushing forward aggressively over the last two months and focusing on building the resources needed to take the growth to the next level. Tactically, that has meant the hiring of additional staff, additional professional resources, taking on additional real estate space, and building new local partnerships.

FEW has a solid brand story that has taken it a long way. The brand story is built on and around Evanston, IL and a prohibition/challenger narrative. Evanston is deeply ingrained into FEW and we like to use that as one of our driving focuses. What that means when it comes to growing our business, is that we seek to do it with local resources as much as possible. In the past month, FEW has taken a lot of initial steps in its next growth phrase and the overwhelming majority of those steps have been Evanston based.

In June, we focused on expanding our staff, professional services resources, and building our investor support. The result from these efforts all led to Evanston based people.
As far as staff resources, we need around five additional staff positions to support our next-level growth. We hired a Sales Director at the beginning of June, which is the first of many key positions we need to fill. We spent the better part of two months interviewing and talking to candidates from New York to San Francisco. After this entire search the best candidate was in Evanston already. He had experience building spirits brands and lived only a mile away from the distillery.

Two of our other staff members are currently planning to or in the process of moving to Evanston. One just finalized a house and will be moving shortly. The second is looking for a house and planning to move in the next few months. This will mean 75% of our staff will live and work in Evanston over the next few months. As we continue to add three additional production staff members and two additional sales staff members we will seek to keep Evanston as a large part of our staff culture.

In July, we finalized and secured the first of several additional real estate spaces we need to grow the business, storage and bottling space. This space is located only a mile from our original location and has been vacant for quite some time. The addition of this space has already had a huge impact on our business by giving us the space we need to produce more products. But this is only the first of a few new physical spaces we need. We have already started looking for a professional office to serve as a home for our sales and business operations staff and hope to secure that space by the end of August. We have also started looking for additional storage and warehousing space in Evanston. We can already see ourselves growing out of our new warehouse and bottling space.

July also marked the beginning of one of our next big projects, building and growing our local retail space. As we have toured around other distilleries and talked with our friends in the business, we quickly realized that our tasting room and retail space is doing less than 10% of what it could be doing. We have models of distilleries in worse geographical locations than FEW doing $1.5m in revenue through their tasting room. Upon realizing and exploring this we quickly became aware that our current tasting room is well below its potential. We have taken a few steps to start correcting this already.

We are in the process of solidifying a partnership with a local Evanston company to help focus and drive the growth in our retail space. This partnership will be financially beneficial to both of us and will drive the growth we expect to see. Our partner has already hired a local Evanstonian to be the project lead for the partnership and we expect to hire another fulltime person to manage the retail operations in the coming months.

Financially, this will have a huge impact for all parties, including Evanston. The growth plans and budgets we have for this project should yield an additional $65,000 to $85,000 of sales and liquor tax revenue for Evanston, annually. We expect this growth to happen over the next three years and to continue to grow significantly thereafter.

We see this, still, as only the beginning. We have a lot of strength and opportunity in our brand and in our business and much of that is rooted in Evanston. As much as anything we see that as one of our core strengths and core partnerships. This has very tangible benefits in the form of mutually beneficial financial relationships and employing Evanstonians, but
also very intangible benefits in the community. The FEW family is active at the board level of 
four local nonprofit and community organizations and has taken a very active role in the 
community life of Evanston, as well. We have resourced our talent, investors, and our 
business relationships from the local community and have and will continue to re-invest our 
resources into the local community so that everyone benefits from our growth and energy.

**Tourism**

Spirit based tourism is a growing category, as consumers want to see where their products 
are created and made. As with farmers markets, and many other "localvore" and similar 
areas, people are interested in distilled spirits, and it is not common for people to have 
experience touring distilleries. Currently FEW sees between 60 to 90 for regular tours or 
visits. On weeks during events and special tour dates and times, this number grows to over 
100 per week.

For example, Tuthilltown Spirits, in Gardiner, New York draws in roughly 700-1000 tourists 
to their facility each week, and they spend nearly $15,000 there. Plus, these tourists spend 
money in Gardiner restaurants. They stay in Gardiner hotels. They purchase gasoline in 
Gardiner gas stations. This results in an economic impact of over $1,000,000 for the 
Gardiner economy. That said, Gardiner is very distant from the nearest city (New York) and 
is over a 90 minute drive from Manhattan. Evanston is poised to outperform this draw, as it 
is on both the El and the Metra line, and has more restaurants, more hotels, and more area 
activities than Gardiner.

On a grander scale, Louisville, KY attracts more than a million tourists per year based on 
their proximity to bourbon distilleries. More than 500,000 of these tourists visit the Bourbon 
Trail and account for hotel visits, restaurant visits, shopping trips to retailers, gas station 
visits and more. Louisville offers a great deal to the spirits tourist, and aggressively pursues 
additional spirits based attractions as evidenced by their current “Bourbon Row” project – 
which has already attracted millions of dollars in private investment with significant 
investment incentives.

In Gatlinburg, Tennessee, Ole Smoky Distillery sells more than 40,000 cases at their 
distillery, employing more than 50 people, and drawing thousands of people into their 
distillery. Again, these tourists are attracted to the opportunity to see and learn about 
distilled spirits, and they spend money not only at the distillery, but in area hotels, 
restaurants, shopping, and more.

Few Spirits seeks to increase its ability to attract tourists to Evanston by improving our ability 
to produce spirits and market our tasting room. While the tour has already been named to 
the Top 25 Distillery Tours in the country, we can do better, and we can attract more people 
to Evanston, and encourage them to spend more time here dining at our restaurants, 
enjoying our shopping, especially on Main Street and downtown, and learning more about 
our exceptional community.

**Additional Resources**
FEW has been profitable since the first year it opened and it has reinvested 100% into the growth of the company. Traditional lending has been helpful to this point, but FEW is growing at a rate that does not fit within the traditional lending model. Traditionally, lending is based on historical performance, which works well in most cases. It works well in every case except for the case of high-growth FEW.

Continuing to execute on the growth plan and the items outlined above, FEW needs an additional credit facility in the amount of $250,000. This will finance the additional still, bottling line, and help make the additional investments needed to expand our retail operations and growth.
To: Chair and Members of the Economic Development Committee

From: Paul Zalmezak, Senior Economic Development Coordinator

Subject: Beacon Academy Discussion

Date: August 21, 2013

Background
As the first Montessori high school in the Chicago area, Beacon Academy has the potential to draw students from a considerable range of Montessori elementary and middle school programs across the Chicago area including Chicago (Near North, Bucktown, and Rogers Park), Evanston, and the North Shore. Beacon Academy will serve as a continuation of the basic educational philosophy that informs all of these schools in addition to providing a new and innovative regional educational option.

The Beacon Academy Board determined that downtown Evanston would provide the most attractive and befitting environment for their new high school (i.e. they will rely on the expertise and facilities of Evanston based educational, artistic, cultural, civic, business, and athletic organizations.)

Summary
Beacon Academy has raised approximately $800,000 of the estimated $2.5 million required to fund start-up costs, cover projected annual operating deficits in the initial years of operation while enrollment builds, and facility build-out and lease costs. Beacon Academy estimates it will take several more years to raise the remaining $1.7 million.

Beacon Academy is working with MB Financial who would be the provider of the construction loan or the letter of credit. MB Financial is currently the bank for Beacon Academy’s operating accounts. Staff has confirmed with MB Financial that given Beacon Academy’s status as a start-up educational organization, it would not be able to provide financing without the financial backing of a credit worthy guarantor (e.g. City of Evanston). MB Financial reported to staff that the risk of lending to Beacon Academy is not as risky as a traditional startup because the bank has an established lending relationship with Near North Montessori and Chiaravalle Montessori - both successful programs who will be serving as Beacon Academy’s “feeder” schools.
Beacon Academy officials have identified two potential locations in downtown Evanston to launch the new Montessori high school: 715 Church Street or 622 Davis Street. At this initial point, Beacon Academy has determined that it will need $650,000 in order to build-out space and open for the 2014-2015 school year. Given this goal, Beacon Academy is seeking to determine if there is interest from the City to provide credit support in the amount of $650,000 to provide a loan guarantee for a construction loan at 715 Church Street or for a bank Letter of Credit for space at 622 Davis Street. In either case, the credit support (i.e. city’s exposure/risk) will be reduced as the underlying loan or letter of credit is reduced in size over time.

715 Church Street
In addition to the costs associated with converting the long vacant former retail space to classrooms and specialty instruction areas (e.g. art room, science lab, etc.) 715 Church Street requires significant improvements including new HVAC, windows, electric, plumbing, stairways, elevator, bathrooms, and fire suppression. Much of the second floor space is in disrepair as building mechanicals were removed and/or seriously impacted by the renovation of the first floor space for ground floor retail use upon the relocation of Barnes & Noble.

According to CoStar, the commercial real estate information, analytics and marketing database, 715 Church Street has approximately 17,680 square feet of contiguous space available. While CoStar is not always up to date, rents are reportedly $20/sq ft gross with an estimated tax of $4.08/sq ft and $2.50/sq ft operating expenses. Jim Nash of Farnsworth Hill is listed as the broker.

To launch Beacon Academy, Beacon is proposing to secure a construction loan with MB Financial Bank in the amount $650,000 to cover its estimated $900,000 build-out costs at 715 Church as summarized in the table that follows:

<table>
<thead>
<tr>
<th>Beacon Academy Sources and Uses of Funds</th>
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<tbody>
<tr>
<td><strong>Sources of Funding</strong></td>
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<tr>
<td>Landlord’s Tenant Allowance</td>
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<tr>
<td>Beacon’s Direct Contribution</td>
</tr>
<tr>
<td>Construction Loan from MB Financial</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
<tr>
<td><strong>Uses of Funds</strong></td>
</tr>
<tr>
<td>Construction Estimate*</td>
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</tbody>
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* Detailed use of funds to be provided upon completion of construction drawings/estimates

622 Davis Street
Beacon Academy has identified 622 Davis Street as an alternative location if 715 Church Street negotiations fail as it is in finished condition and a strong downtown
location. Beacon Academy is negotiating with the property owners who require Beacon Academy to provide a letter of credit that they could draw upon to make lease payments if necessary during the term of the lease.

**Next Steps**

Staff believes the potential public benefits resulting from Beacon Academy's downtown launch are worthy of consideration and recommends further discussion about the means to provide financial assistance to facilitate the lease. In practice, the City of Evanston has not guaranteed loans in the way Beacon Academy has proposed. If the Economic Development Committee prefers to continue this practice, there are a number of alternatives Staff is prepared to discuss. These public benefits include:

1. Job Creation: Beacon Academy has hired four employees, two of whom are Evanston residents. At capacity, Beacon Academy will employ between 30 and 40 individuals.  
2. A draw for new residents and prospective company CEO's who are seeking alternatives to existing public and private school options.  
3. Estimated 250-300 teenagers, 30 to 40 staff, and parents who potentially will patronize local restaurants and retailers.  
4. Complementary to City’s economic development entrepreneurship support efforts through student programs focused on engaging the business community, business plans, and pitch competitions.  
5. Montessori graduates are often company founders – an opportunity to impress an Evanston-ethos during formative years.  
6. Beacon Academy will commit to recruiting a diverse range of Evanstonians to attend the academy.  
7. Adaptive reuse of the long vacant second floor of 715 Church Street.  
8. Collaborative relationships with existing Evanston institutions including Piven, YMCA, Music Institute of Chicago, Evanston Arts Center, Evanston Public Library, and Northwestern University.  

If the Economic Development Committee provides feedback on the proposed project, a request for funding would return at the next appropriate meeting of the Economic Development Committee to review for a recommendation to City Council for funding.

**Attachments**

-Submission from Beacon Academy
REQUEST FOR SUPPORT FROM THE CITY OF EVANSTON
REGARDING 715 CHURCH STREET/622 DAVIS STREET

DELIVERED AUGUST 14, 2013

1. Introduction

Beacon Academy is requesting credit support from the City of Evanston. The credit support will be needed in one of two ways. To facilitate Beacon Academy’s occupancy of 715 Church Street, support in the form on a construction loan guarantee in the amount of $650,000 will be necessary. Alternatively, in order to guarantee the lease at 622 Davis street, credit support the amount of $650,000 will be needed to back a letter of credit that we will procure from our bank, MB Financial. Beacon Academy is not requesting any cash commitment from the City of Evanston.

Beacon Academy is a new bold model for high school education that will open its doors in September 2014 to its first 9th and 10th grade classes. The program merges Montessori principles with independent school best practices and culminates with the IB Diploma Program, an interdisciplinary curriculum that emphasizes self-directed learning, strong writing skills, and an international mindset.

After an extensive market study, visioning process, and site selection effort, the Beacon Academy Board determined that Evanston, and specifically one of these two properties, would provide the most attractive and pedagogically environment for our innovative new secondary school. However, given the extensive renovation costs at 715 Church and the high letter of credit needed at 622 Davis as well as Beacon Academy’s status as a start-up organization, we will not be able to secure either site without financial assistance from the City of Evanston.

2. Background

Beacon Academy is an innovative, community-based high school that will attract students from across the North Shore and the north side of Chicago. Unlike other high schools, Beacon will rely on the expertise and facilities of Evanston based educational, artistic, cultural, civic, business, and athletic organizations. Through partnerships with these organizations, Beacon Academy will provide opportunities for students to dig deep into their passions, spread themselves broadly across the community and integrate all aspects of learning with life.

The basic pedagogical principles of Beacon Academy will be drawn from the work and writings of Maria Montessori. As a Montessori high school, Beacon will follow in the footsteps of a number of innovative new high schools that have opened across the country including The Montessori High School at University Circle in Cleveland, Post Oak High School in Houston and the Montessori High School of Kentucky. In addition there are a number of very successful public Montessori high schools across the country, including Great Rivers in St. Paul and Clark Montessori High School in Cincinnati. As the first
Montessori high school in the Chicago area, Beacon has the potential to draw students from a considerable range of very successful Montessori elementary and middle school programs across the Chicago area.

Beacon Academy’s curriculum will also be structured around the International Baccalaureate (IB) Diploma Program. The IB Diploma Program is one of the fastest growing educational movements in the country. Its approach is international and holistic, offering a rigorous assessment process without relying heavily on standardized testing. IB diplomas are highly regarded around the world and recognized by top colleges and universities as a measure of academic rigor and preparedness for higher education. Beacon Academy will be the only IB school on the North Shore and one of only a handful of IB schools in all of Chicago.

The Board of Trustees comprises parents and educational leaders from communities as far north as Lake Forest down into the heart of Chicago. Most board members are connected as parents, alumni parents or educators to six separate Montessori schools: Forest Bluff School, Montessori School of Lake Forest, Chiaravalle Montessori School (Evanston), Rogers Park Montessori School (Ravenswood), Drummond Montessori School (Chicago) and Near North Montessori School (Chicago). All of these schools have robust middle school programs. Beacon Academy will serve as a continuation of the basic educational philosophy that informs all of these schools in addition to providing a new and innovative regional educational option.

Given the “partnership” model at the heart of Beacon Academy, our space needs are unique. Location, the nature of the immediate environs, and proximity to other local educational, arts, and athletic organizations are more important than school facilities such as theaters, gyms, and playing fields. Both sites provide a ready made and optimal learning environment for hands-on real experience and field studies. Its street presence in downtown Evanston provides the ideal environment to the “school without walls” that we are trying to create. Our goal is for Beacon students to enmesh themselves within the Evanston community and build strong, mutually beneficial relationships our neighbors.

3. **Benefits to the City of Evanston**

We believe that Beacon Academy is a good fit for downtown Evanston and a compatible use with ongoing City needs. More importantly we think there are distinct benefits that Beacon Academy can bring to the Evanston community.

**Filling a Long Neglected Space in the Downtown Corridor (715 Church)**

The space at 715 Church has been vacant for many years and is so specialized in its design that it is not attractive to most traditional office users. The space requires a unique tenant. Its large size and open floor plan make it an optimal choice for Beacon Academy, who can transform it into a vibrant educational environment. Our goal is to re-imagine high school education, and the building that we occupy is crucial to success.

**Supporting Evanston Organizations**
Perhaps our greatest benefit to the Evanston community is our intention to partner with and support local institutions. We have already had discussions with Leslie Brown at Piven Theater, Rick Ferguson at the Musical Offering, Karen Danczak Lyons at the Evanston Public Library, Karen Singer at the YWCA, and Norah Diedrich at the Evanston Arts Center and they are eager to partner with us. Additionally, we have a Memorandum of Understanding with Northwestern’s Center for Talent Development and also plan to work with the Office of STEM Partnerships at NU. We intend to partner with some or all of the following organizations for our fitness/athletic needs: YMCA, YWCA, LA Fitness, Evanston Athletic Club.

Given the new space the MIC will be inhabiting this year and Piven’s uncertain site location, there is an opportunity to create an arts/education corridor. If Piven and Beacon co-located, the potential for synergy with the MIC could be a boon for downtown Evanston and an opportunity for a unique configuration of great cultural and educational institutions.

As mentioned above, beyond these partnerships, Beacon Academy hopes to connect with a range of area businesses, not-for-profits, and other arts and athletic organizations. Direct work with community-based experts and internships that help expose students to a wealth of experiences is at the core of the educational mission at Beacon Academy.

Drawing Students from Outside Evanston

As mentioned above, Beacon Academy expects to draw first and foremost from the Montessori communities across the region. In a survey that was completed by nearly 1000 families from Montessori schools throughout the area, 86% said they would be interested or very interested in a Montessori high school. Our Board is designed to connect schools as far north as Lake Forest right down into the heart of the city. The Montessori network is extensive and robust, providing a ready-made platform for marketing Beacon Academy to the large number of Montessori schools in the region. As noted in the introduction this would be the first Montessori high school in the Chicago area.

Complements Evanston’s Position as a Growing and Robust Center for Innovation and Entrepreneurship

Beacon is a start-up school who will be an incubator for budding entrepreneurs. Our pedagogical model is focused on real world engagement. Our students will interact and intern with community businesspeople, write their own business plans, and learn how to “pitch” their ideas to prospective customers in school wide competitions.

Providing a Smaller High School Option for Current Evanstonians and Members of the Northwestern University Community

While we expect most of our students to come from regional Montessori schools, there are local families, prospective families, and prospective Northwestern University faculty who are looking for a smaller, more unique educational opportunity. ETHS has been a leader in education regionally and nationally. It provides a culturally, socially and intellectually rich educational experience for an extensive range of students. Beacon Academy will be, as should already be apparent, a very different kind of educational experience, designed for a small group of students looking for a more flexible and
individually tailored education. The students who will attend Beacon are those who are already looking for an alternative education and who tend to end up in private schools outside of Evanston or continue on a home-schooled path.

In addition there are Northwestern faculty who come from overseas for either a short 1-2 year visit or more permanently who we understand are often looking for a smaller high school to ease the transition for their children. As an International Baccalaureate school we would also offer a credential that is more widely known outside of the United States, again providing a more familiar environment for overseas faculty. In short providing another high school option in Evanston would certainly increase the chances of drawing more Northwestern families to the Evanston community, families who might otherwise decide not to come to Northwestern at all or who move to and send their children to schools outside of Evanston.

Finally, it is very important to the underlying mission of Beacon Academy to reach out to low-income communities. In general Montessori schools tend to keep tuition a little lower than the average private school and we would continue that tradition, but clearly more would need to be done to attract and assist low-income families. Our initial fundraising campaign has built into it scholarships for low-income students and our initial budgetary projections take into account a large chunk of financial aid. In short we are committed and dedicated to reaching out to low income families interested in pursuing an alternative education.

**Economic Development**

To date, Evanston has hired four employees, two of whom are Evanston residents. At capacity, Beacon will provide between 30 and 40 jobs to the community and will be a draw for new residents who are prospective students and employees. Additionally, our students will patronize local businesses and restaurants. 250-300 teenagers have the potential to bring a good deal of income the downtown area. As detailed in the appendices, it is estimated that over $3 million in new direct and indirect economic activity will be created by Beacon’s operations on an annual basis.

**Leadership in education**

The last benefit to the Evanston community that is worth highlighting is the prospect of continuing to serve as a leader in educational reform. As noted at the outset, Beacon Academy will be the first Montessori high school in the Chicago area, an area rich in the Montessori tradition and chock-o-block full of Montessori elementary schools. Montessori leaders throughout the country have taken a keen interest in Beacon as one of the first free standing Montessori high school projects. Given the relative newness of Montessori high schools, the few that exist tend to draw visitors and researchers from all over the world. Our search for a head has drawn international and national attention, with interested candidates from the west coast, east coast, and as far away as Australia.

One of the great things about small, private, innovative schools is that they can be laboratories for new educational ideas that one would hope will eventually impact the delivery of education in the public schools. In fact there are a handful of public Montessori high schools sprinkled around the country. In some cases these schools have dramatically changed the delivery of education to low income communities. All of the prospective
partners we have met here in Evanston have emphasized the point that our collective work
could be the foundation for a new set of educational ideas here in Evanston and spread far
beyond our own little enterprise.

4. General description of the organization, current and past development activities

As noted above, the Board of Trustees comprises parents and educational leaders from
communities as far north as Lake Forest down into the heart of Chicago. Most board
members are connected as parents, alumni parents or educators to six separate Montessori
schools: Forest Bluff Montessori School (Lake Bluff), Montessori School of Lake Forest,
Chiaravalle Montessori School (Evanston), Rogers Park Montessori School (Ravenswood),
Drummond Montessori School (Chicago) and Near North Montessori School (Chicago). All of
these schools have robust middle school programs. Bios of the current members of the
Board are included in the appendices.

The head of school, Jeff Bell, earned his Masters Degree from the University of
Chicago and graduated with honors with dual Bachelors Degrees from the University of
Missouri. Jeff has worked as the Academic Dean at St. Andrew's-Sewanee School (TN) and as
the Assistant Academic Dean and English Department Chair at Lake Forest Academy (IL). He
has created many innovative programs at these schools including a daily schedule based on
adolescent brain science, mini-terms focused on courses not addressed in typical high
schools, and mixed-age courses to enhance learning. His educational philosophy is driven by
one question: What does it mean to live a good and meaningful life?

The Beacon Academy is a 501(c)(3) organization. Copies of the Articles of
Incorporation and the By-Laws are also included in the appendices.

As a brand new organization we have no past development activities. But the six
schools that are represented on our Board bring a rich history of building projects and fund
raising. The six communities together bring a wealth of development experience and deep
professional connections throughout the Chicagoland area. Please see the appendices for
more detail about these feeder schools.

5. Beacon Academy's request for Assistance from the City of Evanston

Beacon Academy is requesting that the City of Evanston provide credit support in
the amount of $650,000 to provide either backing for a construction loan (715 Church
Street) or for a bank Letter of Credit (622 Davis Street). In either case, the credit wrap will
be reduced as the underlying loan or letter of credit is reduced in size over time.

715 Church has been vacant for nearly a decade and is in serious disrepair, the
necessary improvement costs are significant and include new HVAC, windows, electric,
plumbing, stairways, elevator, bathrooms, fire suppression and the build-out of classrooms
and specialty instruction areas such as an art room and science lab. The extensive work
that the Landlord is proposing to do and the work that the Landlord is requiring Beacon to
complete are detailed in the appendices. Because of the size of the space and specialty
nature of the build-out, the cost of Beacon’s work is estimated at $900,000. The proposed
sources of funding are as follows:

| Project Cost * |
Beacon’s Work  $900,000

**Sources of Funding**

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
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</thead>
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<tr>
<td>Landlord’s Tenant Allowance</td>
<td>$50,000</td>
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<tr>
<td>Beacon’s Direct Contribution</td>
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<tr>
<td>Construction Loan from MB Financial</td>
<td>$650,000</td>
</tr>
<tr>
<td></td>
<td>$900,000</td>
</tr>
</tbody>
</table>

* Estimate only based on the experience of several architects and contractors that are advising Beacon. Until constructions drawings are done, a better estimate will not be available.

Beacon has already raised approximately $800,000 towards it’s $2.5 million goal which is needed to fund start-up costs, projected annual operating deficits in the first few operating years as enrollment builds and the facilities costs as described above. While Beacon is aggressively continuing it’s fundraising efforts and will do so until all $2.5 million is raised, this will take several years to complete. As such, Beacon is proposing to secure a construction loan in the amount $650,000 to cover its build-out costs at 715 Church.

622 Davis Street provides a nearly finished space that is well suited for our purposes. Because the space is in finished condition now and is ideally located in downtown Evanston, we view this space as an excellent alternative to 715 Church. We are in negotiations with the owners of the property who have said that they will want the school to provide a letter of credit that they could draw upon to make lease payments if necessary during the term of the lease.

Beacon will be working with MB Financial (“MB”) who would be the provider of the construction loan or the letter of credit. MB is currently the bank for Beacon’s operating accounts. The institution is also serving Near North Montessori and Chiaravalle Montessori, two of Beacon’s “feeder” schools, on construction financings for their respective capital projects.

MB has indicated that given Beacon’s status as a start-up educational organization, it would not be able to provide financing to Beacon of any kind without the financial backing of a credit worthy guarantor. For this reason, Beacon will require the backing of the City of Evanston to support either a loan or a letter of credit from MB.

Accordingly, Beacon is greatly in need of the City’s assistance to provide a guarantee in order for it to proceed with tenancy in Evanston.

**Appendices**

a. Board Bios  
b. Case Statement  
c. Floor Plan  
d. Economic Development Analysis  
e. Feeder Schools  
f. Construction Costs
Danielle Loevy, President

Danielle is a parent and Board Member at Rogers Park Montessori School. Danielle’s career began as a lawyer in the area of employment discrimination and civil rights law, after which her focus shifted to the prevention of lawsuits and disputes through mediation, facilitation and training. She started a dispute resolution firm, Stone and Loevy, LLC, and was elected President of the Association for Conflict Resolution in Chicago, and Vice President of the Mediation Council of Illinois. Danielle designed and led diversity workshops with Kaleidoscope Group, a nationally (and internationally) known diversity consulting firm based in Chicago, and worked with the Center for Conflict Resolution (CCR) in many different capacities. Twice she received the honor of CCR’s Trainer of the Year award. Danielle earned her JD from Chicago Kent College of Law and her BA from Indiana University.

Jill Greer, Vice President

Jill is a parent and Member of the Board of Trustees at Chiaravalle Montessori School where she serves on the Finance Committee (immediate past Treasurer), Development Committee and Governance Committee. Until recently, Jill headed the Jewish Federations of North America’s Tax-exempt Bond Program. Previously, Jill was a Vice President in Municipal Finance at Goldman, Sachs & Co. Jill received her MBA from the Kellogg Graduate School of Management at Northwestern University and a BS from the Wharton School at the University of Pennsylvania.

Brian King, Treasurer

Brian King has worked in the field of government and not-for-profit project finance for more than 20 years. Brian worked for the City of Chicago as its Deputy Comptroller and Debt Manager during which time he structured and sold dozens of bond issues to finance city infrastructure or to provide funds for programs such as first-time homebuyer assistance. Brian currently works as a Managing Director in the Public Finance group of Mesirow Financial in Chicago, Illinois. Brian has been involved in school governance for eight years, having served on the Board of Directors of Near North Montessori in the role of Treasurer and as Chairman of their Finance Committee. Brian has a bachelor’s degree in Anthropology from Knox College and an MBA from J.L. Kellogg Graduate School of Management at Northwestern University. Brian has two children currently enrolled at Near North Montessori.

Patty Abrams, Secretary

Patty Abrams received a BA in Humanities before working as a corporate project manager. With her husband Brian, she is a founder, officer and director of Corporate Imaging Concepts, Inc. Patty has served on the MSLF Board of Directors, volunteered her time at MSLF and as a reading tutor in North Chicago. Patty is inspired by the expertise, commitment and energy of her fellow members of the founding Board, and thrilled to be involved in the process of
bringing secondary Montessori-inspired education to Chicago. Patty and Brian live in Lake Bluff with their daughters.

**Lissa Hektor**

Lissa has been active in the field of Montessori education since 1978 as an administrator, teacher, teacher educator and consultant, including leading the Montessori School of Lake Forest through its most ambitious period of expansion, from 1981 through her retirement in 2011. Lissa holds a Business Degree from the Private Handelsschule Holzberger in Munich Germany. Lissa is the parent of three children and the grandparent to seven grandchildren. She is proud that her own children graduated from Montessori and that five of her seven grandchildren currently attend a Montessori School.

**Lynn Lillard Jessen**

Lynn co-founded Forest Bluff School and was its first teacher, leading the original primary class in 1982. Two years later, she established the Young Children's Community for the youngest children, ages 18 months to 3 years. Lynn is co-author with Paula Polk Lillard of “Montessori From the Start,” a guide for helping the young child at home from birth on. Lynn is a graduate of Smith College and has AMI training at both the Assistants to Infancy and Primary levels. She is married to Ned Jessen and their three children are all graduates of Forest Bluff. Her youngest daughter is also a graduate of the Montessori High School in Cleveland, Ohio, the first Montessori boarding school at the high school level in the United States. Lynn and Ned both serve on its Board of Directors.

**Suzanne LoSasso**

Suzanne LoSasso recently “retired” from the RPMS Board of Directors after six years where she served as the co-chair of the Diversity Committee. She has three boys at the school, spanning the 6-9, 9-12, and middle school programs. Suzanne returned to secondary education in 2011 serving as a College Counselor and Guidance Coordinator at a small, independent high school. She received her BA in English Literature from Georgetown University and her Masters in Counseling Psychology from Northwestern University. Suzanne previously worked at other independent schools in admissions, coaching and as an advisor to students. She remains an active volunteer at RPMS and also gives her time to the Alumni Admissions Program at Georgetown University interviewing prospective students.

**Mark Neidlinger**

Mark Neidlinger is the principal of Drummond Montessori Magnet School, the first Public Montessori School in Chicago. Mark is thrilled to see the growth of his own school, now in its eighth year and offering Montessori Education to preschool through eighth grade students. Mark is continually inspired by the vibrant community of Drummond Montessori and deeply appreciates the many partnerships with our area private sector Montessori schools and remains confident that future collaboration will strengthen and expand Montessori within the public sector. Additionally, Mark enjoys spending time in his home state of Michigan. He has won awards for the design of his cottage, which is located in Douglas. In addition to his interest in architectural and landscape design, Mark enjoys animated dinner parties, toiling in his yard, cycling and hiking the sand dunes of West Michigan.
Debbie Senoff-Langford

Debbie has taught preschool through elementary in Montessori schools around the world and is currently the Head of School at Rogers Park Montessori School. Ms. Senoff-Langford holds a Bachelor's degree in History from the University of Wisconsin, a Master's degree in Early Childhood Special Education, completed the Ph.D. dissertation and received a certification in non-profit leadership from Kellogg School of Management and Type 75 certification from the State of Illinois. Ms. Senoff-Langford is currently the president of AIMS (Association of Illinois Montessori Schools), Executive Committee of LMAIS (Lake Michigan Association of Independent Schools), and Executive Committee of ICNS (Illinois Coalition of Non-Profit Schools).

Audrey Perrott

As the current Executive Director at Near North Montessori School and with over 24 years of experience in Montessori education, Audrey comes to the Board interested in assisting with the creation of Beacon. Audrey believes in a high school that prepares students for success in the 21st century and meets the needs of the adolescent students in accordance with the principles of Montessori’s third plane of development.

Susan Stearn

Susan Stearn has 20 years of project management experience representing owners’ interests for major mixed-use commercial developments. Susan is a registered architect and a LEED AP. She has a Bachelor’s degree in Architecture from University of Illinois, Urbana-Champaign and a Master’s degree in Urban Planning from University of Illinois, Chicago. Susan was involved with Chicago Women in Architecture in the early ’90s, serving as Vice President and President. She also served on the board of Joel Hall Dancers and Center from 2005 to 2007 and was on the Building Committee at Near North Montessori during its recent new gymnasium capital campaign. She has been the Wellness Council chairperson at Walter Payton College Prep for the past four years. Susan has three daughters who attended Near North Montessori through eighth grade. Michelle, 20, is a sophomore at Georgetown University; Sarah, 16, is a junior at Walter Payton College Prep; and Emily, 14, is a freshman also at Walter Payton. Susan and her husband Howard live in the Ravenswood Manor neighborhood of Chicago.

Dana Thomson

Dana is a parent at Chiaravalle Montessori School and the Director of Research at the Center for Talent Development at Northwestern University. She has worked at the Center for more than 12 years, during which she has been integrally involved in the ongoing evaluation and strategic development of the center’s educational programs for learners in Pre-K through 12th grade. She also conducts research, and has published articles and book chapters on numerous issues in the field of talent development. Dana received her MSEd from Northwestern University and a BA in philosophy from Carleton College in Northfield, MN.
An innovative high school based on Montessori principles.

Montessori schools have been successfully educating students for more than a century, thriving in almost every corner of the globe. Educational fads come and go, but Montessori endures. Recent developments in adolescent neuroscience and education research have proven that the Montessori method provides an ideal environment for children to learn. Moreover, as a national conversation on education reform continues, leaders have begun to take notice that Montessori principles transform education at the high school level as well.

Beacon Academy is the first and only Montessori-based high school in Chicagoland and will draw students not only from the 12 accredited area Montessori elementary schools, but also from beyond the Montessori community. In September 2014, Beacon Academy will open its doors to its first 9th and 10th grade classes of approximately 50 students in total, offering a bold new model of secondary education. By 2017, Beacon Academy will be a full four-year secondary school with projected enrollment of 250-300 students. The school will be located near Northwestern University and public transportation, positioned to draw students from a wide radius and within easy access to partner institutions throughout the Chicago area.

“There are a growing number of Montessori high schools starting up around the country. Beacon will be modeling the best practices of Montessori and independent schools whose outcomes in terms of college placement, character development, and educational excellence have been superior. Beacon will offer a full slate of...”

“"To succeed in the 21st-century economy, students must learn to analyze and solve problems, collaborate, persevere, take calculated risks and learn from failure... At the most innovative schools, classes are “hands- on,” and students are creators, not mere consumers. [The] discovery-based learning leads young people to find and pursue a passion, which evolves, over time, into a deeper sense of purpose.”

Tony Wagner, Harvard University
Beacon Academy’s Guiding Principles

Empower the whole student. Guide students through their own self-discovery and personal passions, allowing for reflection and social emotional health.

Ground learning in relationships. Connect whole people in meaningful, productive ways—whether that is peer-to-peer, adult to teen, or mentoring.

Reflect the real world. Promote diversity of experiences and interactions, integrate subjects meaningfully, practice life skills, and work on real challenges.

Unleash entrepreneurial impact. Empower students as change makers that have ownership over service learning experiences, entrepreneurial activities, student-led clubs, and advocacy.

Be a school without borders. Look outward--connect to the world through transportation, tools, technology, and creative local and global partnerships of all sizes.

The Beacon Academy Distinction

Beacon’s curriculum will incorporate the International Baccalaureate Diploma Program. The IB Program is fully accredited and well recognized by colleges and universities worldwide as a measure of academic rigor and preparedness for higher education. Both the IB Program and Montessori share a global perspective with a social focus, encouraging students to think critically while synthesizing knowledge from multiple disciplines.

“*The Montessori method fits perfectly into America’s emerging economy.*”

Steve Denning, Management and Business “Guru”

Beacon’s curriculum embodies the principle of “learning by doing” by affording students abundant opportunities for hands-on investigation, student-centered discussions, experimentation, critical thinking, and fieldwork. Moving beyond the traditional conception of a “classroom,” students at Beacon Academy will engage in fieldwork and apprenticeships with experts with whom they can problem-solve, collaborate, and contribute to ongoing projects of far-reaching significance. Beacon is a community school in the strongest sense of the word with Northwestern University, Evanston, and greater Chicago serving as our extended campus.

Through Beacon’s formal partnership with Northwestern University’s Center for Talent Development, students will expand their access to dozens of challenging and specialized courses
Founding Head of School, Jeff Bell

Beacon Academy has successfully drawn the attention of national leaders in education and educational reform. Among them is our Head of School, Jeff Bell. Jeff earned his Masters Degree from the University of Chicago and graduated with honors with dual Bachelors Degrees from the University of Missouri. Jeff has worked as the Academic Dean at St. Andrew’s-Sewanee School (TN) and as the Assistant Academic Dean and English Department Chair at Lake Forest Academy (IL). He has created many innovative programs at these schools including a daily schedule based on adolescent brain science, mini-terms focused on courses not addressed in typical high schools, and mixed-age courses to enhance learning. His educational philosophy is driven by one question: What does it mean to live a good and meaningful life?

Transforming Education with Your Help –
The Time to Act is Now

In September of 2014, we will welcome our first class of students with highly skilled administrators and teachers and an integrated, rigorous curriculum. Beacon students will be our country’s next social entrepreneurs, business leaders, and educators. They will change the world, but we must provide them with the opportunity to begin. We ask for your support in this important endeavor.

Our plan requires generous Founders to make leadership-level commitments commensurate with our financial goal over the next year. Founding and opening Beacon Academy requires an initial investment with a significant ROI. We need to raise $2.5 million in order to most fully implement our program.

These start-up funds will be used for:

- Personnel costs — Head of School, faculty, staff
- Lease and build-out of initial site
- Development of marketing and admissions tools and materials
- Purchase of equipment and supplies
- Creation of a scholarship fund
- Projected operating losses in years 1 and 2 (as school builds student population)

Thank you for your interest in Beacon Academy. For more information, please contact our board.

Danielle Loevy, Board President
3848 North Greenview Avenue
Chicago, IL 60613 (312) 925-9558
danielleloevy@me.com

Jeff Bell, Head of School
jbell@beaconacademychicago.org
(224) 420-1821

www.beaconacademychicago.org
Beacon Academy (Beacon), a private high school opening in the fall of 2014, is in the process of finalizing selection of a site. While Evanston is the preferred location, sites are also being considered in Wilmette, Chicago and Skokie. Upon opening, Beacon will be the first high school in the Chicago area whose curriculum is influenced by Montessori teaching methods. Also, as the first Montessori-inspired high school in the US to be located in a major metro area, Beacon is expected to receive national and international attention.

Beacon Academy will have a substantial business profile:
- Twenty Six (26) direct full-time jobs will be created. At least 24 of these will be professional positions.
- Twenty-thousand (20,000) square feet of vacant space is required in downtown Evanston.
- One hundred and eighty (180) high school students will attend classes daily. It is anticipated that at least 80% of these children and their families do not currently reside in Evanston.
- Incorporating the “classroom in the community” concept, the students (and their families) will be consumers of many different goods and services within the community, for example:
  - Health club memberships for physical education
  - Memberships to local theatre and music venues as well as arts centers
  - Guest lecturers from local university faculty
  - Procurement of supplies from local vendors
  - Patronization of local restaurants, retail shops and coffee shops by students, staff and parents
  - Procurement of professional services such as business insurance through local brokers
  - Demand for local housing to accommodate staff and parents wishing to locate closer to the school

In total, three million dollars ($3,227,000) in new direct and indirect economic activity will be created by Beacon’s operations on an annual basis (see attached worksheet).

In addition, Beacon will need to allocate substantial resources to build out any vacant space so as to make it suitable for our needs.

www.beaconacademychicago.org
### Estimation of the Contribution of Beacon Academy To the Economy of the City of Evanston

**Assumptions:**
(Based upon full enrollment in year 5)

<table>
<thead>
<tr>
<th>Employees (Faculty and Staff)</th>
<th>26</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students</td>
<td>180</td>
</tr>
<tr>
<td>Families</td>
<td>140</td>
</tr>
</tbody>
</table>

### Operations

#### Direct Economic Contribution

<table>
<thead>
<tr>
<th>Operations</th>
<th>$20,000/Month</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lease</td>
<td></td>
<td>240,000.00</td>
</tr>
<tr>
<td>Wages and Benefits of Staff residing in Evanston (assumes 1/2 of Staff reside in Evanston)</td>
<td></td>
<td>650,000.00</td>
</tr>
<tr>
<td>Parking $120</td>
<td>1/2 of Teachers 0.5</td>
<td>18,720.00</td>
</tr>
<tr>
<td>Parking $120</td>
<td>20% of Students 0.2</td>
<td>51,840.00</td>
</tr>
<tr>
<td>Parking $120</td>
<td>2 Guest Spaces 2</td>
<td>2,880.00</td>
</tr>
<tr>
<td>Memberships</td>
<td></td>
<td></td>
</tr>
<tr>
<td>YMCA (200 @ $50 each)</td>
<td></td>
<td>10,000.00</td>
</tr>
<tr>
<td>Piven Center (200 @$50 each)</td>
<td></td>
<td>10,000.00</td>
</tr>
<tr>
<td>Evanston Public Library</td>
<td>$2,500 for annual rights for all students</td>
<td>2,500.00</td>
</tr>
<tr>
<td>Taxes Paid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Property Tax</td>
<td>Estimate of Increase in property taxes due</td>
<td>75,000.00</td>
</tr>
<tr>
<td>Sales Tax</td>
<td>Based on purchases of supplies and goods by students, faculty and staff</td>
<td>355.22</td>
</tr>
<tr>
<td>Parking Tax</td>
<td>Based on number of spaces leased for school purposes</td>
<td>2,052.00</td>
</tr>
<tr>
<td>Utility</td>
<td></td>
<td>500.00</td>
</tr>
<tr>
<td>Purchases</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food 1/2 students $6.00/day 6 0.5</td>
<td></td>
<td>540.00</td>
</tr>
<tr>
<td>Food 1/2 Employees $6.00/day 6 0.5</td>
<td></td>
<td>78.00</td>
</tr>
<tr>
<td>Coffee/Snacks 1/3 students $3.00 day 3 0.34</td>
<td></td>
<td>163.60</td>
</tr>
<tr>
<td>Coffee/Snacks 1/2 Employees $3.00/day 3 0.5</td>
<td></td>
<td>39.00</td>
</tr>
<tr>
<td>Supplies $50.00/Student/year 50</td>
<td></td>
<td>9,000.00</td>
</tr>
<tr>
<td>Supplies $2,000 Misc. School 2000</td>
<td></td>
<td>2,000.00</td>
</tr>
<tr>
<td><strong>Direct Annual Economic Contribution</strong></td>
<td></td>
<td>1,075,687.82</td>
</tr>
</tbody>
</table>

#### Indirect Economic Contribution

- Insurance sourced in Evanston, supplies purchased, services provided by local vendors
- Multiplier Factor 2

**Indirect Economic Contribution**

<table>
<thead>
<tr>
<th>Indirect Economic Contribution</th>
<th>2,151,375.64</th>
</tr>
</thead>
</table>

**Estimation of the Annual Economic Contribution of Beacon Academy to the City of Evanston**

$3,227,063.45
Overview of Feeder Schools

- Board members and Heads of School from 5 independent and 1 public Chicagoland Montessori schools are developing Beacon Academy

- The five independent schools have longevity in the community and robust financial positions

<table>
<thead>
<tr>
<th>School</th>
<th>Years in Operation</th>
<th>Annual Budget</th>
<th>Endowment</th>
<th>Recent Capital Campaigns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chiaravalle</td>
<td>48 years</td>
<td>$4.5 million</td>
<td>$6.5 million</td>
<td>$3.5 million</td>
</tr>
<tr>
<td>Rogers Park</td>
<td>46 years</td>
<td>$5.0 million</td>
<td>$1.0 million</td>
<td>$5.0 million</td>
</tr>
<tr>
<td>Near North</td>
<td>50 years</td>
<td>$6.5 million</td>
<td>$3.0 million</td>
<td>$4.3 million</td>
</tr>
<tr>
<td>Forest Bluff</td>
<td>31 years</td>
<td>$1.5 million</td>
<td>$4.0 million</td>
<td>$3.5 million</td>
</tr>
<tr>
<td>Lake Forest</td>
<td>43 years</td>
<td>$3.0 million</td>
<td>$0.5 million</td>
<td>$1.0 million</td>
</tr>
</tbody>
</table>
COST BREAKDOWN FOR BEACON ACADEMY AT 715 CHURCH ST.

8/7/13

Landlord’s Work

- New stairway for entry
- Replace existing windows
- Install 3 new windows (of similar size and shape as those that are replaced)
- Working passenger elevator
- Working freight elevator
- Restrooms: 8 female toilets and 4 male toilets
- HVAC systems for normal office use
- Fire suppression system including water main, risers and sprinkler heads
- Electrical – dedicated 800 amp electrical service, directly metered to tenant with whips for lighting and outlets spaced every 8 feet along perimeter walls
- Demolition of previous tenant finishes and fixtures
- Fire-rated partitions and entry/exit doors for demising walls between Beacon and other tenants and common space

Beacon Work

- Interior painted drywall partitions/walls and doors
- Carpet or VCT tile
- Ceilings: acoustic tile and/or gyp board
- Plumbing and fixtures for janitor closet, kitchen, teacher lounge, science lab and art room
- Light fixtures
- Telephone and communication systems
- Exterior Signage subject to landlord’s approval and City of Evanston ordinances
- FFE – furniture, fixtures and equipment
Experiential learning, Entrepreneurial thinking, Interdisciplinary studies.

challenges, critical exploration, and real-world impact.
Natural love of learning will grow through meaningful collaboration are cultivated in harmony, where a student's individual choice and creative

It is a place where the world, and integrated community of learners within Chicago and

Beacon Academy will be an empowering, entrepreneurial, vision
1. Empower the whole student

2. Root learning in relationships
   
   A social emotional health. Guide students through their own self-discovery & personal passions, allowing for reflection.

3. Model the real world
   
   Teen or mentoring. Connect whole people in meaningful, productive ways — whether that is peer to peer, adult to adult, or mentorship.

4. Unleash entrepreneurial impact
   
   Promote diversity of experiences & interactions, integrate subjects meaningfully, practice life skills, and work on real challenges.

5. Be a school without borders
   
   Entrepreneurial activities, student-led clubs, and advocacy. Empower students as change makers that have ownership over service learning experiences.

Design Drivers

Creative local and global partnerships of all sizes. Look outward — connect to the world through transportation, tools, technology, and
**IDEAL**

300 students for new construction and future plan and baseline

**STARTER**

5-year plan based on 250 students x a retail outfit

**PHASE ONE**

Two-year plan based on 100 students x the starter

**NET SOFT COMPARISON**

IDEAL: 26220

STARTER: 14650

PHASE ONE: 10100

Comparison:

100%

38.5%

55.8%
LEARNING STUDIOS

Prepared environments

Highly flexible

Media-rich

Learning Studios are dynamic core classroom spaces with universal features and several different flavors of furniture & arrangements to accommodate primary classes.
Experiences:

- Large-scale seminar presentations
- Telecommunication
- Lab allows for cross-disciplinary projects to come alive

A media-rich humanities lab

A creative design lab with all the tools for digital and analog making. This space acts as a teaching assistant.

Make a Create Lab

STEM Lab

Classrooms, with additional engineering and technology materials to empower students.

Physics, and chemistry, the tools of basic biology, comes alive. Equipped with a place where sciencefy comes alive.
STEM LAB

1400

WET
STATIONS

LAB TABLES

STORAGE

& PREP

Health
Independent Research
Robotics
Integrated Science

Ideal Classes & Activities:
Research stations
Demonstration lab station
Wet lab equipment
Lab prep space

Potential Tools & Features:

Classes:
To empower engineering & technology
Classrooms, with additional materials
Biology, physics, and chemistry
Equipped with the tools of basic
A place where science comes alive.

STEM
Workshops
After-school programs
Art & Design
Ideal Classes & Activities:
- Digital media stations
- Gallery & display
- Projects storage & boards
- Wet & prep area
- Supply storage
- Prototyping tools
- Large scale printing
- 3-D printer
Potential Tools & Features:
- Projects to life.
- To hold seminars and bring perfect hub for teaching artists making. This space acts as a tool for digital and analog creative design lab with all

CREATE LAB

1400
American Literature
American History
Interdisciplinary Cultural Studies
Language

Ideal Classes & Activities:
- Small group lecture
- Peace circle
- Green screen
- Acoustically sensitive
- Lab allows for class-wide intercommunication
- For cross-disciplinary
- A media-rich humanities lab

Potential Tools & Features:
- Large scale teleconferencing
- Large scale seminar

Experiences:
- Small group work areas & screens
- Large scale teleconferencing


VIDEO WALL

SMALL GROUP

TIERED SEATING

GLOBAL LAB

1400
What spaces & features does a community hub have?

COMMUNITY HUB

5000
<table>
<thead>
<tr>
<th>Area</th>
<th>Square Feet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Tools &amp; Technology Center</td>
<td>1400 SF</td>
</tr>
<tr>
<td>Administrative Hub</td>
<td>725 SF</td>
</tr>
<tr>
<td>Small Group</td>
<td>1750 SF</td>
</tr>
<tr>
<td>Learning Studios</td>
<td>1575 SF</td>
</tr>
<tr>
<td>Labs</td>
<td>1400 SF</td>
</tr>
<tr>
<td>Community Hub</td>
<td>3100 SF</td>
</tr>
</tbody>
</table>

**Gross Total (35%)**

**Gross Total (20%)**

**Net Total**

**Phase One**
Your starter school space is like a starter home. It requires a bit of planning, hacking, experimenting, and good ol' fashioned creativity and cooperation.
MONTHLY RETT REPORT FOR JULY 2013

DATE: August 1, 2013
TO: Mayor and Aldermen
FROM: Rodney Greene, City Clerk
SUBJECT: RETT Report -- July 2013

BUDGET 2013 $2,100,000

<table>
<thead>
<tr>
<th>Month</th>
<th>Amount</th>
<th>Transactions</th>
<th>Month</th>
<th>Amount</th>
<th>Transactions</th>
<th>Cumulative</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>113,540</td>
<td>57</td>
<td>January</td>
<td>122,065</td>
<td>55</td>
<td>122,065</td>
</tr>
<tr>
<td>February</td>
<td>113,355</td>
<td>37</td>
<td>February</td>
<td>86,775</td>
<td>56</td>
<td>208,840</td>
</tr>
<tr>
<td>March</td>
<td>125,990</td>
<td>65</td>
<td>March</td>
<td>137,094</td>
<td>75</td>
<td>345,934</td>
</tr>
<tr>
<td>April</td>
<td>92,096</td>
<td>59</td>
<td>April</td>
<td>275,644</td>
<td>118</td>
<td>621,578</td>
</tr>
<tr>
<td>May</td>
<td>146,980</td>
<td>93</td>
<td>May</td>
<td>378,779</td>
<td>123</td>
<td>1,000,357</td>
</tr>
<tr>
<td>June</td>
<td>180,770</td>
<td>136</td>
<td>June</td>
<td>270,866</td>
<td>131</td>
<td>1,271,223</td>
</tr>
<tr>
<td>July</td>
<td>175,975</td>
<td>109</td>
<td>July</td>
<td>527,936</td>
<td>134</td>
<td>1,799,159</td>
</tr>
<tr>
<td>August</td>
<td>167,620</td>
<td>101</td>
<td>August</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>68,290</td>
<td>60</td>
<td>September</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>October</td>
<td>142,161</td>
<td>73</td>
<td>October</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>November</td>
<td>164,800</td>
<td>84</td>
<td>November</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>December</td>
<td>143,605</td>
<td>84</td>
<td>December</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

July 2013 revenues were reduced to reflect this expenditure: $5; C.C. Recorder of Deeds

Monthly average needed to meet budget $175,000
FY 2013 Monthly Average $257,023

46 exemptions @ $100 ea = $4,600; CUMULATIVE $41,300

There were nine (9) $ million sales in July 2013
07/08/13 -- 2138 Orrington $1,165,000 Tax $5,825; Seller: Petrick; Buyer: Clifford / Usesm
07/08/13 -- 2639 Lincolnwood $1,210,000 Tax $6,050; Seller: Somerset Property Group LLC; Buyer: Bronner
07/09/13 -- 1710 Orrington $36,750,000 Tax $183,750; Seller: Orrington Hotel LLC; Buyer: CRP/Dow Orrington Hotel LLC
07/12/13 -- 2714 Lincoln $1,380,000 Tax $6,900; Seller: McCarthy; Buyer: Cable
07/12/13 -- 2319 Lincoln $1,200,000 Tax $6,000; Seller: Kodner; Buyer: Grimsted
07/15/13 -- 631 Brummel $1,665,000 Tax $8,325; Seller: MRR 631 Brummel LLC; Buyer: Brummel Invest.Partners LLC
07/17/13 -- 925 Edgemere $3,800,000 Tax $19,000; Seller: United Central Bank; Buyer: Breslow
07/18/13 -- 1881 Oak/1890 Maple $10,519,000 Tax $52,595; Seller: Parc Investment Properties LLC; Buyer: 1890 Maple LLC
07/22/13 -- 2119 Harrison $1,185,000 Tax $5,925; Seller: Connor; Buyer: Hewko

NSP2 sales = $0; CUMULATIVE $1,523,500

NSP2 purchases = $719,850; CUMULATIVE $790,850
## Economic Development – SEPTEMBER, 2013 UPCOMING MEETINGS & EVENTS

<table>
<thead>
<tr>
<th>Organization</th>
<th>Next Meeting Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Howard Street Business Association</td>
<td>To Be Determined</td>
</tr>
<tr>
<td>Evanston West Village Business Assoc. (EWVBA)</td>
<td>To Be Determined</td>
</tr>
<tr>
<td>WestEnd Business Association</td>
<td></td>
</tr>
<tr>
<td>Business District Head Meeting</td>
<td></td>
</tr>
<tr>
<td>Economic Development Committee</td>
<td></td>
</tr>
</tbody>
</table>

The last meeting was held July 23rd. The next meeting will be September 5, 2013.

This is a meeting of key representatives from Evanston’s business and merchant groups. The next meeting date is to be determined.

The next regularly scheduled meeting of the EDC will be Wednesday, August 28 at 7:30 pm

## Economic Development – MEETINGS/ON-GOING ACTIVITIES

<table>
<thead>
<tr>
<th>Economic Development Committee</th>
<th>The Economic Development Committee met on August 7, 2013. The agenda included:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items for Consideration: A. Financial Consideration for Now We’re Cookin. Now We’re Cookin’ requested an Economic Development Partnership Grant of $60,933 for the period from 9/1/13 – 12/31/14. The committee voted unanimously to recommend approval for the grant to City Council. This item will be on the City Council’s September meeting agenda.</td>
<td></td>
</tr>
<tr>
<td>Items for Discussion: A. Autobarn Expansion of Operations to 222 Hartrey Avenue. There was discussion of possible assistance to Autobarn that includes sales tax sharing, support from the City for application to Cook County’s 7B program, and TIF funding assistance for expansion to 222 Hartrey Avenue. The committee voted unanimously to recommend City support for Autobarn’s application to Cook County’s 7B program and to expand the TIF to include 222 Hartrey Avenue. Projections of the sales to contemplate a sales tax sharing will be presented at the September meeting</td>
<td></td>
</tr>
<tr>
<td>Communications: A. Announcements/Updates from EDC Members; B. Real Estate Transfer Tax Report; C. Monthly Economic Development Communication.</td>
<td></td>
</tr>
</tbody>
</table>

The next Economic Development Committee meeting is August 28, 2013.

The next Health and Wellness Roundtable meeting is scheduled for October 5, 2013 at the YMCA. The Marketing & Online Presence and Special Events & Promotions subcommittees will provide updates. A Health and Wellness event is planned for September in Downtown Evanston. Carolyn Dellutri is helping to coordinate the event with the Special Events & Promotions subcommittee.

New businesses that have opened or relocated in Evanston recently include: Dragonfly Collections, Inc. (1309 Chicago Ave), Pure Barre (910 Church St), Blue Pearl Stone (517 Dempster St), Not Fade Away (1104 Davis St), Forever Yogurt (1739 Sherman Ave), Pepperpot (1623 Simpson St), Kazoom (1940 Dempster St), Farmhouse Tavern (703 Church St)
### Marketing

Staff continues to utilize evanstonedge.com to feature local businesses, and also comprehensive twitter, linked in, and Facebook strategies.

### Larger scale Development Sites and “Prospects” (General – see also some specific examples below)

Staff continues to work with property owners and potential developers of large vacant properties in Evanston to identify potential tenants and uses for these properties and provide assistance for approvals and other City processes. In addition, Staff has been actively working with eight potential “prospects” (i.e. higher profile businesses and/or targeted industries) who are considering locating with the City.

### Technology/Entrepreneurship/Innovation Events

RISE! Scheduling kickoff meeting is September 10, 2013. Regus Grand Opening will be September 11, 2013. Economic Development staff is drafting a plan for Entrepreneurship and independent/freelance support network centered on a technology/startup meet up events with local and regional technologists, founders, and entrepreneurs in addition to creating networking opportunities for Evanston-based founders to discuss highly focused subject matter.

### Small Business Assistance

Economic Development staff continues to work with existing businesses, assisting them in pursuing physical upgrades and expansions, facilitating them through the various permitting processes, etc. Staff is also working with several new small businesses ranging from cafes and restaurants to retailers, small office users and entertainment uses. Since the start of 2013, staff has worked with over 60 leads for potential new small businesses.

### Façade Improvement Program

Staff continues to meet and work with other businesses interested in the program. Several inquiries have been received; however, no applications have been submitted at this time.

### Vacancy Rates

Current vacancy rates as of 2nd Quarter 2013 are:

- Office = 9.5%
- Industrial = 9.9%
- Commercial = 7.6%

### Great Merchant Grant Program

West Village Merchant Grant request will come before the Economic Development Committee at its August 28 meeting.

---

### ECONOMIC DEVELOPMENT - KEY POTENTIAL/DEVELOPMENT SITE ACTIVITY REPORT

<table>
<thead>
<tr>
<th>Site location</th>
<th>Overview of Development Opportunities</th>
<th>Proposed Bldg. Area</th>
<th>Site Area (Approx)</th>
<th>Next Steps</th>
</tr>
</thead>
</table>

70 of 73
<table>
<thead>
<tr>
<th>Location</th>
<th>Description</th>
<th>Proposed/Existing Area</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1817 Church St.</td>
<td>City Council approved a $200,000 construction loan funded from the West Evanston TIF to Evanston North Shore Contractors Cooperative to redevelop 1817 Church Street as a contractor cooperative. 1,000 s.f. addition is proposed to second floor of existing structure.</td>
<td>5,764</td>
<td>The Evanston North Shore Contractors Cooperative are in the midst of interior demo/buildout. Second floor expansion is under construction. Construction completion anticipated December 2013.</td>
</tr>
<tr>
<td>1708-1710 Darrow</td>
<td>City-owned properties – residential structures were demolished late 2011.</td>
<td>N/A</td>
<td>The buildings were demolished late 2011. City staff is considering options for future redevelopment. Portion of property paved for neighborhood business parking.</td>
</tr>
<tr>
<td>Evanston Plaza</td>
<td>WHI Real Estate Partners LLC and Bonnie Investment Group have formed a partnership to revitalize the center.</td>
<td>N/A</td>
<td>Bonnie Management continues to market the plaza to national retailers, services, etc. Staff remains in contact with Bonnie Management on a regular basis.</td>
</tr>
<tr>
<td>Asbury/Oakton</td>
<td>Staff has on-going conversations with property owner regarding potential business prospects that might be well-suited for the site. Property owner is currently not interested in selling the property.</td>
<td>14,000</td>
<td>Staff continues to have conversations with property owner about potential business prospects.</td>
</tr>
<tr>
<td>Chicago/Main</td>
<td>Staff has worked with developer to create a mixed-use office/retail development.</td>
<td>90,000</td>
<td>Grand opening party planned 9/15</td>
</tr>
<tr>
<td>1801-1805 Church</td>
<td>Vacant former gas station property owned by Daniel Cheifetz</td>
<td>n/a</td>
<td>Site is currently in litigation. City Council previously approved resolution granting authority to negotiate purchase of property. Staff assessing risk of acquiring relative to contamination.</td>
</tr>
<tr>
<td>Property</td>
<td>Description</td>
<td>Current Status</td>
<td>Future Plans</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
<td>----------------</td>
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</tr>
<tr>
<td>1911-1917 Church Street</td>
<td>Staff is coordinating with the property owner to determine opportunities for potential redevelopment partnership.</td>
<td>N/A - no defined plan yet for redevelopment</td>
<td>Staff is working with a number of organizations for the potential redevelopment of the site.</td>
</tr>
<tr>
<td>1901 Dempster (former KFC)</td>
<td>Yum! Brands, the corporate owner of the KFC brand has enlisted a local broker to price and list the property, scheduled for Mid October. The property will have a 20 year deed restriction. Uses restricted include any restaurant that is deemed competitive to other Yum holdings including pizza, Mexican, chicken seafood, and hamburgers, although the latter two are negotiable as Yum is in the process of selling its A&amp;W and Long John Silver brands.</td>
<td>TBD</td>
<td>Brian Adams, Mid America broker indicated no strong interest in the property. Yum! Brands has listed the former KFC property reportedly for $750,000. PAZ will continue to direct potential users of the property to YUM broker. Just turkey?</td>
</tr>
<tr>
<td>623-627 Howard</td>
<td>The City of Evanston purchased this property in mid-October 2011. The City is currently assessing the condition of the building and making necessary repairs to the property.</td>
<td>Na</td>
<td>Peckish One, LLC has developed a business plan for the development of the space into a restaurant and microbrewery. The partners have a lease-to-own agreement on the property and expect to open in December 2013. They are starting the zoning and permitting process for interior construction.</td>
</tr>
<tr>
<td>727-729 Howard Street</td>
<td>City-owned properties located on Howard Street. Staff is currently working with a theatre company to try to relocate to this building on Howard Street.</td>
<td>4,000</td>
<td>City Council did not approve award of the lowest bid for this project. A revised concept is in process.</td>
</tr>
<tr>
<td>Former &quot;Borders&quot; site-Maple</td>
<td>Downtown Evanston is taking the lead as primary contact with the representatives from Arthur Hill regarding refilling this space; Staff is assisting Downtown Evanston in looking for prospects</td>
<td>21,900</td>
<td>Arthur Hill seeking tenant.</td>
</tr>
<tr>
<td>1211 Chicago Avenue</td>
<td>Trader Joe’s is under construction.</td>
<td>13,000</td>
<td>Grand Opening is September 6, 2013</td>
</tr>
<tr>
<td>1615 Oak Street</td>
<td>Smylie Brothers Brew Pub will be opening a restaurant and Brewery in the downtown area.</td>
<td>11,000</td>
<td>Variance from off-street parking requirements approved in February. Interior construction underway. Planning to open in 2014.</td>
</tr>
<tr>
<td>737 Chicago Avenue</td>
<td>AMLI residential development has available ground floor commercial space for lease</td>
<td>1,186 to 7,900</td>
<td>Staff is working with the broker to find higher end retail/service users.</td>
</tr>
<tr>
<td>1720 Central Street</td>
<td>Central Station Apartment Development has available ground floor commercial space for lease</td>
<td>10,650</td>
<td>Staff is working with the broker and several interested businesses interested in opening in the available commercial spaces</td>
</tr>
</tbody>
</table>