AGENDA

1. CALL TO ORDER / DECLARATION OF QUORUM

2. APPROVAL OF MEETING MINUTES OF April 24, 2019

3. ITEMS FOR CONSIDERATION
   A. Great Merchant Grants
      a. Howard Street Business Association
   B. Entrepreneurship Support Program Grants
      a. Charrisse Roberson – Gettwisted Designs
      b. Rachel Holmes – Confidence Now Consulting
   C. Equity in the Arts Hiring Program
      a. Mudlark Theater
   D. Financial Wellness Initiative
   E. Business License Process Change

4. ITEMS FOR DISCUSSION
   None

5. COMMUNICATIONS
   A. Monthly Economic Development Communication
   B. Announcements/Updates from EDC Members

6. ADJOURNMENT

Order of Agenda Items is subject to change. Information about the Economic Development Committee is available at http://www.cityofevanston.org/economicdev special-council-committees/economic-development-committee/index.php. Questions can be directed to Paul Zalmezak at 847.448.8013. 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 City Manager’s Office 48 hours in advance of the scheduled meeting so that accommodations can be made at 847-448-8683 (Voice) or 847-448-8064 (TTY).
ECONOMIC DEVELOPMENT COMMITTEE
Wednesday, April 24, 2019 – 7:30 p.m.
Lorraine Morton Civic Center, 2100 Ridge Avenue, City Council Chambers

Members Absent: Ald. Wilson, A. Pigozzi, J. Sierant
Staff Present: P. Zalmezak, P. Martínez, K. Boden, S. Johnson

AGENDA

1. CALL TO ORDER / DECLARATION OF QUORUM
Meeting called to order at 7:39 p.m.

2. APPROVAL OF MEETING MINUTES OF February 27, 2019
Rainey/Braithwaite
Approved 5-0

3. ITEMS FOR CONSIDERATION
NONE

4. ITEMS FOR DISCUSSION
   A. Economic Development Annual Report
   Mr. Paul Zalmezak provided a brief overview of the economic development report. He mentioned over 30 businesses opened last year, including a new theater. He mentioned affordable housing and entrepreneurship support continues to be a priority for the City of Evanston.

   Mr. Zalmezak summarized the improvements made through the Storefront Modernization Program and the Great Merchants Grant. He mentioned the unemployment rate is low, average 3.5%, as well as low vacancies.

   Mr. Zalmezak said commercial rent rates are high and continue to climb, which is a challenge to small businesses; another challenge is that office space is very scarce and in high demand.

   Mr. Powell asked where the funding for youth employment and other entrepreneurship initiatives come from. Mr. Zalmezak indicated the Entrepreneurship Support Program comes from ED funding, Elevate Evanston is more of an umbrella. Ald. Braithwaite clarified that $90,000 for Elevate Evanston comes from the Good Neighbor Fund from NU.

   Mayor’s Summer Youth Employment Program comes from City of Evanston and private funding.

   Mr. Powell questions why the Mayor’s name was part of the summer youth employment program, since it is tax-payer funded. He suggested the name be changed to “City of Evanston Summer Youth Employment Program.”

   Ald. Simmons directed staff to bring it up to City Council for discussion.

   B. Financial Wellness Initiative
Ald. Rue Simmons said many of Evanston’s residents need financial empowerment, and she would like to see staff and financial institutions come up with a strategy to reach the community.

Mr. Zalmezak said staff is working to convene organizations and the private sector to strategize to help residents stay out of debt, build wealth, buy a house, and build credit. He requested 90 days to come back with an update.

Ald. Simmons said she wants to see a badging system, or progress acknowledgement program. She also wants to see a focus on early financial education for youth and young adults, especially for young parents (baby bonds, home purchasing, etc.).

Ald. Wynne said this initiative was needed, and recommended reaching out to the high school’s financial education program to make sure efforts are unified and updated.

Ald. Simmons asked staff to include insurance agents.

Ald. Rainey said the City already has many other committees where a lot of these issues should be addressed, instead of EDC (i.e. Housing committee, MWEBE). EDC should help businesses.

Ald. Simmons said EDC won’t be doing the work, just convening the organizations and businesses that address these issues and refer residents.

C. ComEd / Alley Lighting
Ald. Simmons introduced Mr. Carlo Cavallaro from ComEd.

He explained it would be $80/year per light pole with 3000 kelvin bulbs.

Ald. Braithwaite explained that he made the referral to EDC, because the current power stations impede development on the West side of Evanston, and he wants ComEd to explore the cost to bury the lines that go over the parcels that could be redeveloped and find out who owns them.

Ald. Wynne asks if you can bury a high tension panel. Cavallaro said yes but it comes down to cost.

ComEd to work with ED staff and coming back with an update.

D. MWEBE Report
Mr. Zalmezak explained that the Purchasing Manager, Tammi Nuñez, was unable to be present, but that he would give an overview, as well as Sharon Johnson.

Mr. Zalmezak gave a brief overview of the make-up of the committee and its mission, helping Evanston-based, women, and minority businesses.

Programs: Procurement Fair, Value Innovation Technologies (local spend metrics)

Sharon Johnson introduced herself and explained she manages the Local Employment Program. She provided a summary of last year’s activities regarding hiring for City contracts, and the resources shared with the library to help contractors.
City’s goal for MWEBE is 25% local employment -- 27.1% achieved in 2018.

5. COMMUNICATIONS
   A. Monthly Economic Development Communication
      Mr. Paul Zalmezak introduced Katie Boden, Economic Development Specialist, as a new member of the Economic Development Division.

      B. Announcements/Updates from EDC Members

      Changes in zoning board. Mary Beth Berns leaving.

      Ald. Rainey asked who Hubris was and if we can reach out to them for the financial wellness initiative, because we should support the businesses we help fund.

      Mr. Powell clarified his suggestion to change the name of the summer youth program was not an attack on the mayor.

      Ald. Simmons said Gyros Planet Evanston has a grand opening at 2:30 p.m. on Friday 4/26.

6. ADJOURNMENT

Meeting adjourned at 8:44 p.m.
Memorandum

To: Economic Development Committee

From: Johanna Leonard, Community Development Director
Paul Zalmezak, Economic Development Division Manager
Paulina Martínez, Assistant to the City Manager

Subject: Evanston Great Merchant Grant – Howard Street

Date: July 18, 2019

Recommended Action:
Staff supports a recommendation from the Economic Development Committee to City Council for approval of financial assistance through the Great Merchant Grant for an amount not to exceed $250 to the Howard Street Business Association.

Funding Source:
Staff recommends utilizing the Economic Development Business District Improvement Program (Account 100.21.5300.65522). The approved 2018 Fiscal Year Budget allocated $150,000 to this account. To date, $37,995.47 has been spent from this account, leaving $112,004.53 available for expenditure.

Summary:
Staff has been working with the Howard Street Business Association to create a new event on Howard Street. The Association is planning an open house for Howard Street businesses on September 5, 2019. Participating businesses will showcase their products and services. The city funding will support the cost of marketing the event, as outlined below.

The design of the poster and other marketing materials were created by Mr. Matt Rodgers, a member of the HSBA. After discussing the marketing strategy with Ms. Lenice Levy, President of the HSBA, staff recommends an amount not to exceed $250 to promote the event via Facebook and Instagram. Posters will be distributed across all City-owned community and recreation centers, and other gathering places around town.
Howard Street Business Association
The Howard Street Business Association requested funds for the following projects:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>50 posters</td>
<td>In-house</td>
</tr>
<tr>
<td>Social media ad</td>
<td>$250</td>
</tr>
<tr>
<td><strong>Total Request</strong></td>
<td><strong>$250</strong></td>
</tr>
</tbody>
</table>

These activities are considered business district staples and eligible under the Neighborhood Promotion Project Eligibility Criteria of the Great Merchants Grant. Following staff review, Howard Street Business Association was found to be in good standing under the guidelines of the Great Merchants Grant and is eligible to receive the requested services.
Memorandum

To: Chair and Members of the Economic Development Committee

From: Johanna Leonard, Community Development Director
      Paul Zalmezak, Economic Development Division Manager
      Paulina Martínez, Assistant to the City Manager

Subject: Entrepreneurship Support Program Application

Date: July 17, 2019

Recommended Action:
Staff supports a recommendation from the Economic Development Committee to City Council for approval of financial assistance through the Entrepreneurship Support Program for the following applicants:

- Charrisse Roberson, Gettwisted Designs - $2,160
- Rachel Holmes, Confidence Now Consulting - $1,000

Funding Source:
Staff recommends utilizing the Economic Development Entrepreneurship Support Fund (account #: 100.21.5300.62664). The approved 2019 Fiscal Year Budget allocated $50,000 to this account. To date, $4,449.42 has been spent, leaving a remaining balance of $45,505.58.

Summary:
Staff received two applications: Charrisse Roberson and Rachel Holmes. Applicant, Charrisse Roberson from Gettwisted Designs, completed the LEND Business Training Engagement Program on June 17, 2019. Gettwisted Designs focuses on custom clothing such as wedding dresses and prom dresses, and does recreations and alterations to supplement the custom clothing work. In 2015 Ms. Roberson created a handcrafted bow tie line called 2Twist Bows. The business owner is requesting funding assistance to replace old equipment, which would allow her business to keep growing.

Applicant, Rachel Holmes from Confidence Now Consulting, completed the LEND Business Training Program on July 9, 2019. Confidence Now Consulting is a life-coaching consulting firm that provides clients with in person coaching sessions as well as phone call coaching. Ms. Holmes also does speaking engagements, and monthly corporate trainings.
The table below provides a summary of the eligible program expenses this month's funding requests.

<table>
<thead>
<tr>
<th>Business</th>
<th>Eligible Expenses</th>
<th>Total:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Permitting</td>
<td>Tools/Equipment</td>
</tr>
<tr>
<td>Gettwisted Designs</td>
<td>$250</td>
<td>$2,160</td>
</tr>
<tr>
<td>Confidence Now Consulting</td>
<td>$250</td>
<td>$750</td>
</tr>
<tr>
<td>Total:</td>
<td>$250</td>
<td>$2,160</td>
</tr>
</tbody>
</table>

The applicants submitted three quotes for the services and certification to be funded as summarized below:

**Gettwisted Designs:**

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Computer Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Best Buy</td>
<td>$1,185.99</td>
</tr>
<tr>
<td>2. Dell Website</td>
<td>$899.99</td>
</tr>
<tr>
<td>3. Micro Center for Electronics</td>
<td>$899.99</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Industrial Sewing Machine Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Amazon</td>
<td>$825.00</td>
</tr>
<tr>
<td>2. Gold Star Tool</td>
<td>$699.99</td>
</tr>
<tr>
<td>3. Sewing Machines Plus</td>
<td>$2,299.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Plus Size Dress Form Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Amazon</td>
<td>$495.00</td>
</tr>
<tr>
<td>2. The Shop Company</td>
<td>$495.00</td>
</tr>
<tr>
<td>3. AllBrands</td>
<td>$539.99</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Professional Iron Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Target</td>
<td>$62.99</td>
</tr>
<tr>
<td>2. Home Depot</td>
<td>$65.55</td>
</tr>
<tr>
<td>3. Walmart</td>
<td>$62.99</td>
</tr>
</tbody>
</table>
Confidence Now Consulting:

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Laptop Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Amazon</td>
<td>$368.00</td>
</tr>
<tr>
<td>2. High Performance Computers</td>
<td>$998.00</td>
</tr>
<tr>
<td>3. Target</td>
<td>$259.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Blue Microphones</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Amazon</td>
<td>$74.99</td>
</tr>
<tr>
<td>2. Best Buy</td>
<td>$129.99</td>
</tr>
<tr>
<td>3. Staples</td>
<td>$109.99</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Cricut Maker</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Amazon</td>
<td>$369.00</td>
</tr>
<tr>
<td>2. Blick Art Materials</td>
<td>$399.99</td>
</tr>
<tr>
<td>3. Michael's</td>
<td>$349.99</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>LLC Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>State of Illinois</td>
<td>$250.00</td>
</tr>
</tbody>
</table>

Background:
The Entrepreneurship Support Program was created to provide limited one-time grant assistance to individuals starting or expanding a small business in Evanston. The program guidelines were approved by City Council in April, 2017 after consultation with the Minority, Women, and Evanston-Based Enterprise Committee, Sunshine Enterprises, and LEND. The program guidelines provide for up to $1,000 in assistance with City licensing and permitting fees, and/or up to $2,500 in assistance for qualifying business expenses such as tools, equipment, insurance, professional services, training, certifications, and production space.

Applicants must provide three estimates for services to be funded (when possible) and must submit a detailed business plan as part of the application, and proof of either residence in Evanston or a business location in Evanston.

Attachments:
- Gettwisted Designs Application
- Gettwisted Designs Business Plan and Quotes
- Gettwisted Designs Certificate of Program Completion
- Confidence Now Consulting Application
- Confidence Now Consulting Business Plan and Quotes
- Confidence Now Consulting Certificate of Program Completion
**Applicant Name**  
Charrisse Roberson

**Applicant Address**
647 Dodge Avenue  
Evanston, Illinois 60202  
United States

**Applicant Email**

**Applicant Phone Number**

**Business Name**  
Gettwisted Designs

---

**Please provide a description of your business (500 words max)**

I currently run two businesses: Gettwisted Designs and 2Twist Bow. I founded Gettwisted Designs in 2007. Gettwisted Designs focuses on custom clothing such as wedding dresses and prom dresses, although I also do recreations and alterations to supplement the custom clothing work. In 2015 I created a handcrafted bow tie line and called my bow ties 2Twist Bows. I saw that there were no truly reversible bow ties in the market, and I realized that people would be willing to pay more for a bow tie that functions as two unique bow ties. I have been able to sell a lot of my bow ties to wedding parties, churchgoers, and those attending formal events such as prom. My passion for fashion has allowed me to work for myself and focus my efforts on the projects that I most enjoy. Gettwisted Designs has been my primary business up until this point, but I hope to grow 2Twist Bow in the coming years.

---

**Services to be funded:**

**Tools/Equipment**

**Do you need financial assistance with City licensing or permitting requirements?**  
No

**Please describe how you intend to use Entrepreneurship Support Program funding to expand your business (500 words max)**

Computer: To continue innovating in the design space and capitalizing on the uniqueness and customizability of my products, I will need design tools. In particular I will need software that will require a specific computer to operate.

Professional Industrial Sewing Machine: Much of the $1500 annual expense I pay towards equipment maintenance goes towards maintaining my current sewing machine. Getting a professional industrial sewing machine that is better able to handle my workload will significantly reduce these annual maintenance costs

Plus Size Dress Form: A dress form is critical to the dressmaking and alteration process, but my current dress form is 5 years old and is literally falling apart.

Professional Iron: Normal irons generally need to be replaced frequently, so I’d like to invest in a professional iron that is higher quality and which has a longer lifetime

All of the above tools will allow me to both increase the capacity of my production, which is critical as I seek to continue growing, and to maintain the quality of my product.
Upload business plan (.pdf or .doc) *

Upload proof of completion of a business training program (Community Business Academy or other) *

"I certify that all of the information contained in this document, all statements, information, and exhibits that I am submitting is true and accurate and to the best of my knowledge. I certify that I have reviewed the Program Guidelines associated with the City of Evanston's Entrepreneurship Support Program." (Type name below for signature).

<table>
<thead>
<tr>
<th>Date</th>
<th>Monday, June 17, 2019</th>
</tr>
</thead>
</table>
Gettwisted Designs/So’Custom Bows & Tiez
Business Plan

Charrisse Roberson
Gettwisted Designs/So’Custom Bows & Tiez
647 Dodge Ave.
Evanston, IL
847-361-5294
Gettwisteddesigns45@gmail.com
Socustombowstiez@yahoo.com
# Table of Contents

I. **Professional Experience & Founding History** ................................................................. 3  
II. **Operating Structure** ........................................................................................................... 5  
III. **Market Analysis** ............................................................................................................... 7  
IV. **Marketing Plan** ............................................................................................................... 13  
V. **Management** .................................................................................................................. 15  
VI. **Capital Summary and Sourcing** ...................................................................................... 16  
VII. **Financial Analysis [Est. Businesses]** ........................................................................... 18  
VIII. **Future Planning/Ambitions** .......................................................................................... 20  
IX. **Grant Request** ............................................................................................................... 21
Professional Experience & Founding History

I. Please list any and all of your relevant formal qualifications (i.e. business education, degrees, training certifications, LEND or Sunshine Academy engagement):

EDUCATION:
- Bachelor degree in Merchandising Management & Operations Retail
- Associate degree in Fashion Design
- Sunshine Academy: Certificate of Completion for Sunshine Business Academy, Excellence Award, Honorable Mention for Product Business of the Year
- J.T Foxx Mega Event: Certificate of Mega Branding
- LEND Business Training Engagement: Certificate of Completion

II. Please summarize your personal background and employment record; how did you get to where you are today?

I have always had a passion for fashion. As a teenager I would always sketch and create my own designs. I eventually made my own prom dress, which was my first piece of formal wear. In 1996, I created Gettwisted Designs. At the time I was creating wedding dresses, prom dresses, and doing alterations and recreations. While doing fashion I got my first managers position at Docks Fishery when I was just 17 years old. I was a manager for Best Buy, then I was a branch manager for TCF Bank for 12 years. In 2007 I decided to give my all to fashion so that I could work from home while raising my two sons. In 2015 I created a custom, handmade bow-tie company and dubbed it the 2Twist Bow.

III. Briefly describe when, how, and why you formed the company and its development so far.

How did you develop a passion for your current business?

I currently run two businesses: Gettwisted Designs and 2Twist Bow. I founded Gettwisted Designs in 2007. Gettwisted Designs focuses on custom clothing such as wedding dresses and prom dresses, although I also do recreations and alterations to supplement the custom clothing work. In 2015 I created a handcrafted bow tie line and called my bow ties 2Twist Bows. I saw that there were no truly reversible bow ties in the market, and I realized that people would be willing to pay more for a bow tie that functions as two unique bow ties. I have been able to sell a lot of my bow ties to wedding parties, churchgoers, and those attending formal events such as prom. My passion for fashion has allowed me to work for myself and focus my efforts on the projects that I most enjoy. Gettwisted Designs has been my primary business up until this point, but I hope to grow 2Twist Bow in the coming years. My son is very interested in helping me with 2Twist Bow and may start working for
the business at some point in the future. I have always loved fashion and design, and I even designed my own
prom dress when I was in high school.
Operating Structure

I. Please list and describe your present products and services offered, as well as the hours and days of operation:

Present Products and Services:

- Wedding dresses, prom dress, custom bow tie line, jewelry
  - Custom dresses
    - Wedding/Prom
    - Based on what the customer wants (ranges widely)
    - Take anywhere between 24 hours and 2 months to make, depending on the intricacy of the work
  - Jewelry
    - Buy beads and create unique earrings, necklaces and bracelets
  - Bow tie
    - Two bow ties in one (reversible)
    - Create sets that consist of one bow tie and a pocket square
    - 75% of the customers for bow ties are adults, although I do have some younger clients
    - Can accept any fabric that the client brings and turn it into a bow tie

- Services
  - Alterations and recreations
    - Alteration
      - Take in pants, shirts, jackets etc.
    - Recreation
      - If you like certain aspects of an outfit, keep those and change the rest

Days and Hours of Operation:

I work from home and do not have fixed hours of operation. I typically work 8 hour days, although that changes depending on how much work I have.

II. Please detail your pricing structure. Is it variable? (i.e. changing menu or product line)

My pricing structure is highly variable because many of the pieces are custom. Fabric and labor costs factor into the cost. I have provided price ranges for each of the products:

- Custom Dresses (mainly wedding dresses and prom dresses)
  - $200-$800
- Jewelry
  - $5-$25
  - The average price of a piece is about $8
- Bow ties
  - $10-$20 for children’s bow ties
  - $29-$65 for adults
  - $65 includes one bow tie and a pocket square
- Services
  - Alterations
    - $12 take in pants
    - $17-$25 for size intake
    - Depends on the fabric and the number of pockets
III. How do you receive payment? (i.e. What is your system for processing credit cards? Are you cash only? Do you accept checks and, if so, what is the deadline for payment?)

The payment methods that I accept are cash, Visa, Mastercard and checks from corporations.

IV. How does your business model change over the course of the year? Is there a consistent customer flow or is there seasonal variation? If so, how do you address seasonal changes?

Weddings are the most seasonal aspect of our business. Spring and summer are generally the busiest seasons for wedding. School events like prom and graduation are generally scheduled for summer and spring as well, which means that we have an additional influx of orders around that period. This influx is still manageable, so I have not implemented any mechanisms to address seasonal change.
Market Analysis

I. What is your intended audience or demographic? Provide the geographic location of your customers and the type of customers you serve:
The products I am selling are relevant to the large wedding, prom, church, and costume jewelry markets in and around the City of Evanston. While I can serve the larger Chicagoland area, I will focus my market analysis specifically on anywhere within a 5-mile radius of the Evanston City Center, as these are the areas I have focused on historically and where I can most feasibly focus my targeted marketing efforts.

II. List firms you have identified as primary competitors in your market(s). Identify their strengths and weaknesses then describe how your company stands out:

Bow Ties:

BowTieExpressions¹ - Etsy retailed based in Knoxville, Tennessee:
- **Strengths**
  - Offer the largest selection of handmade bow ties on the internet.
  - Specialize in "unique" patterns that can't be found anywhere else.
  - Makes pre-tied and self-tied bow ties, girls hair bows, and pocket squares
  - Prices range from $11-$15 based on size of bow tie
  - 5134 sales over approximately 4 years
  - 535 reviews and about 5 stars

- **Weaknesses**
  - Tie is not adjustable, have to buy several different sizes
  - Can’t do custom designs, at least on online retailing platform
  - Doesn’t sell multi-packs
  - Doesn’t hold significant market share in Chicago market

at21boutique² - Etsy retailed based in Chicago:
- **Strengths**
  - Handmade and high quality bow ties
  - Sells multi-packs
  - 894 sales over approximately 3 years
  - 168 reviews and about 5 stars

- **Weaknesses**
  - Priced from $25 to $70 for more ornate designs
  - Can’t do custom designs, at least on online retailing platform

TheLittlestGentleman³ - Etsy retailer based in Sweet Grass, Montana:
- **Strengths**
  - Focused on Children’s Clothing and Accessories—Mainly bow ties and suspenders

• Sell bow ties and suspenders in packs
• 11806 Sales over approximately 6 years
• 1452 reviews and about 5 stars

• Weaknesses
  • Sizing is hard to determine
  • Can’t do custom designs, at least on online retailing platform
  • Doesn’t hold significant market share in Chicago market

The Tie Bar⁴ - Large online retailer

• Strengths
  • Focused on ties, but also sells bow ties and other male fashion items
  • Has significant market share
  • $19 fixed price point for most bow ties

• Weaknesses
  • Not handmade
  • Can’t do custom designs

The Men’s Wearhouse⁵ - Brick and Mortar retailer

• Strengths
  • Sells a wide variety of male fashion items
  • 4 brick and mortar locations in Chicago

• Weaknesses
  • Not handmade
  • $30-65 price point
  • Can’t do custom designs
  • No brick and mortar locations in Evanston

I distinguish myself from the companies listed above because my bow ties are handmade, can be custom-ordered, and will be distributed through a variety of channels, including online retailers, trade shows, pop-up shops, door-to-door marketing, and through partnerships with churches, schools, and event management companies. By diversifying my distribution channels and product offerings, I will be able to focus my resources on catering to the Evanston customer base, and growing my business in that way.

Dresses:

Diana’s Bridal⁶ - Brick and Mortar retailer in Skokie:

• Strengths
  • Brick and mortar experience is a must-have for many people buying wedding dresses
  • Also offer bridesmaids dresses

---

⁴https://www.thetiebar.com/bow-ties?gclid=Cj0KCQjw6lfoBRCItsAF6q06sjzhcJq1ofrUHRNInjZ5E1XeF
FcxB9GCbIr_JADBxfkf5K4abpkN8aAiucEALw_wcB
⁵https://www.thetiebar.com/bow-ties?gclid=Cj0KCQjw6lfoBRCItsAF6q06sjzhcJq1ofrUHRNInjZ5E1XeF
FcxB9GCbIr_JADBxfkf5K4abpkN8aAiucEALw_wcB
⁶https://www.dianasbridalboutique.com/aboutus
- Have designer brands

**Weaknesses**
- Higher price point
- Lack customizability

**Flora and Lane** – Etsy retailed based in Chicago:

**Strengths**
- Offers creative bohemian-inspired wedding dresses
- Custom-makes all items
- Tailors to Chicago by allowing people to get custom-fitted if they’re able to visit the Chicago location
- 81 sales over 5 years
- 23 reviews and around 5 stars

**Weaknesses**
- Targeting a niche/non-traditional subset of the Wedding market
- Chicago location may still be inconvenient for many Evanstonians
- Price point is still quite high

I distinguish myself from the companies listed above because I will be able to produce custom, creative, and unique dresses at a lower price point than either of the companies. I make custom dresses for $200-$800, and specialize in creative adjustments/alterations to dresses customers have already bought but are unhappy with. The variety of distribution and marketing channels I will pursue increases my ability to cater to and attract the Evanston population specifically.

**Costume Jewelry:**

**Nice Trading Company** – Brick and Mortar retailer in Ravenswood:

**Strengths**
- Low prices
- Been in business 35+ years
- Engrave for free if you purchase $500 worth of jewelry.

**Weaknesses**
- $50 minimum purchase

**Unsigned Beauties** – Etsy retailed based in Evanston:

**Strengths**
- Wide variety of accessories offered
- 413 sales over 10 years
- 174 reviews and around 5 stars

**Weaknesses**

---

7 https://www.etsy.com/shop/floraandlane?ref=simple-shop-header-name&listing_id=518826485
8 https://www.yelp.com/biz/nice-trading-co-chicago
I distinguish myself from the companies listed above mainly because of my unique distribution model. By selling these products exclusively at trade shows and pop-up shops, I will be able to sell individual items and get right in front of the customer.

III. Based on the geographic location of your business and the target demographics listed above, please provide an estimate for the total market size; in other words, how many unique potential customers exist in this space?

**Weddings**

**Total Number of Weddings in 5-mile radius around Evanston:** (368,018 people in 5-mile radius around Evanston\(^\text{10}\)/5.2 million people in Cook County)* 29,562 weddings in Cook County\(^\text{11}\) = **2088 weddings** in 5-mile radius around Evanston

At Weddings, there are three main groups I'll be targeting, the bride, bridesmaids, and the groomsmen.

- **Bride:** 2088 weddings * 1 bride per wedding * $1100 wedding dress average cost\(^\text{12}\) = **$2.3 million**
- **Bridesmaids:** 2088 weddings * 5 bridesmaids per wedding * $150 bridesmaids dress cost\(^\text{13}\) = **$1.25 million**
- **Groomsmen:** 2088 weddings * 5 groomsmen wedding * $45 average bowtie cost = **$470k**

The total wedding market size for my products is thus 2.3m + 1.25m + 470k = **$4.02 million**

**Church Events**

At churches, I will be targeting the provision of bow ties for the members of the church choir:

50 churches in Evanston\(^\text{14}\) * Average 15 members per church choir * $45 average bowtie cost = **$34k**

**Prom**

I will seek to provide wedding dresses and bow ties for prom events at local high schools:

- **New Trier Township High School:** 1000 in senior class
  - Dresses: 500 girls * $400 average prom dress cost\(^\text{15}\) = **$200k**
  - Bow Ties: 500 boys * $45 average bow tie cost = **$23k**
- **ETHS:** 825 in senior class
  - Dresses: 412 girls * $400 average prom dress cost\(^\text{16}\) = **$165k**
  - Bow Ties: 412 boys * $45 average bow tie cost = **$19k**

---

\(^\text{10}\) [http://mcdc.missouri.edu/cgi-bin/broker? PROGRAM=apps.caps2010.sas&_debug=&latitude=42.0569&longitude=87.6871&radii=3+5+10&sitename=&units=+&cntypops=on]

\(^\text{11}\) [https://www.theweddingreport.com/index.cfm/action/wedding_statistics/view/market/id/17031/idtype/c/location/Cook_IL/]

\(^\text{12}\) [https://www.foxbusiness.com/features/4-tips-to-cut-the-cost-of-your-wedding-dress]

\(^\text{13}\) [https://www.thespruce.com/how-much-does-it-really-cost-to-be-in-the-wedding-3489929]

\(^\text{14}\) [http://www.churches-in.com/illinois/Evanston/]

\(^\text{15}\) [https://www.promgirl.com/prom-guide/costs]

\(^\text{16}\) [https://www.promgirl.com/prom-guide/costs]
• Niles North: 500 in senior class  
  ○ Dresses: 250 girls * $400 average prom dress cost\(^{17}\) = \$100k  
  ○ Bow Ties: 250 boys * $45 average bow tie cost = \$11k  

• Roycemore School: 50 in senior class  
  ○ Dresses: 25 girls * $400 average prom dress cost\(^{18}\) = \$10k  
  ○ Bow Ties: 25 boys * $45 average bow tie cost = \$1.1k  

• Beacon Academy: 50 students in senior class  
  ○ Dresses: 25 girls * $400 average prom dress cost\(^{19}\) = \$10k  
  ○ Bow Ties: 25 boys * $45 average bow tie cost = \$1.1k  

The total dress market at prom events in nearby schools is \$485k while the bow tie market is \$55k. This comes out to a total prom market size of \$540k.

Costume Jewelry

I will target my costume jewelry sales to mostly women but also men. Most of the selling for this jewelry will occur at trade shows. I will target the following age groups:

• 18-34: 92k people in radius in age group * 44% likelihood to own costume jewelry\(^{20}\) * 1.5 pieces of costume jewelry per person * $7.75 average price for costume jewelry = \$478k  
• 34-50: 76k people in radius in age group * 45% likelihood to own costume jewelry * 1.5 pieces of costume jewelry per person * $7.75 average price for costume jewelry = \$393k  
• 50-64: 34-50: 70k people in radius in age group * 33% likelihood to own costume jewelry * 1.5 pieces of costume jewelry per person * $7.75 average price for costume jewelry = \$270k  

The total costume jewelry market in a 5-mile radius around Evanston is \$1.14 million.

Summary

For my three main products, the targeted market sizes based off of the above information is as follows:

• Dresses (Including alteration and customization): \$4.04 million  
• Bow Ties: \$559k  
• Costume Jewelry: \$1.14 million  

Across all the products I sell, the total market size comes out to \$5.7 million.

\(^{17}\) https://www.promgirl.com/prom-guide/costs  
\(^{18}\) https://www.promgirl.com/prom-guide/costs  
\(^{19}\) https://www.promgirl.com/prom-guide/costs  
IV. Considering the total market size and your primary competitors, estimate what percentage share of the market you currently occupy:

My total market share as of right now is $31k rev/$5.7 million market share = 0.55%

- Dresses: ($15950 rev/$4.04 million market size) = 0.4%
- Bow Ties: ($7.5k rev/$559k market size) = 1.3%
- Costume Jewelry: ($7.75k rev/$1.14 million market size) = 0.7%
Marketing Plan

I. What marketing strategies have you used in the past? Which were most successful? Consider Pricing (discounts, bundles), Promotions, Product (variations to the services offered to keep customers engaged), Placement (where are messages most effective)

I’ve focused primarily on word-of-mouth and letting consumers know about my products through my presence as a vendor at trade shows. Listed below is the full list of marketing channels I have pursued in the past.

- Trade shows
- Social Media
  - Facebook
  - Instagram
- Word-of-Mouth
- Flyers
- Discounts: Have offered discounts to ETHS students for prom and graduation
- Have made items for free to market my products
- Online retailers
  - Ebay

II. Describe which demographics of the customer base and geographical area you will target with marketing in the future. Where is the greatest need for awareness?

There are four major consumer groups that I’d like to capture and introduce my product to through my marketing efforts:

- Church-goers
  - Especially people attending/participating in church events
- High-School Students
  - Should be focusing on seniors and other groups who have organized events requiring formal attire
- Wedding
  - Brides, Bridesmaids, Grooms, and Groomsmen all are potential clients.
  - Necessity for outfit coordination means that there is the potential for larger orders
- Northwestern
  - A large student body and many formal events means that there is a big potential market for the product that I should tap into

III. What marketing strategies do you plan on pursuing going forward?

- Online retailers- Have successfully sold many items online, custom and creative designs attract significant audience
  - Etsy
  - Ebay
- Trade shows
  - Can sell jewelry, bow ties, and dresses at shows
  - Provides marketing opportunity for products and services, will have flyers to distribute to potential clients and will ask them to spread the word
  - Attend trade shows regularly and made good profits at all that I have attended
- Pop-up shops
  - Sell jewelry, bow ties, and dresses door-to-door, moving items around in her car
  - Market products and services door-to-door and get orders for bow-ties/dresses that way
  - Leave flyers and contact info at all houses
- Partnerships- Reach out directly to event managers at these organizations
  - Churches
    - Church services or choir groups have many
    - Can offer discount if able to get a bulk order
  - Schools
    - Prom, graduation, or other formal events
    - Can provide student and bulk discounts
  - Event management companies
    - Specifically wedding venues who might be able to add us on as a service they offer or provide an opportunity for us to market
    - Can offer significant discount if we’re able to get a bulk order/partnership with them
- Social Media- Maintain online presence
  - Facebook
  - Instagram
Management

I. Describe your organizational structure. Please include key management roles and a list of employee responsibilities.

My organization is self-run and will remain self-run for the foreseeable future. I make, market, sell, and distribute all products by myself.

II. How many employees do you have under contract: part-time and full-time?

Currently do not have any employees under contract. It is a sole proprietorship.
Capital Summary and Sourcing

I. List the major operating equipment that your company owns or leases (feel free to add more items if required):

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Age</th>
<th>Condition/Description</th>
<th>Check One (X)</th>
<th>If Owned:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Computerized sewing machine</td>
<td>1</td>
<td>4 years</td>
<td>2 years left</td>
<td>X</td>
<td>Owned: $399</td>
</tr>
<tr>
<td>2. Heavy duty sewing machines</td>
<td>1</td>
<td>6 years</td>
<td>2 years left</td>
<td>X</td>
<td>Owned: $299</td>
</tr>
<tr>
<td>3. Surger</td>
<td>1</td>
<td>8 years</td>
<td>2 years left</td>
<td>X</td>
<td>Owned: $289</td>
</tr>
<tr>
<td>4. Surger</td>
<td>1</td>
<td>6 years</td>
<td>4 years left</td>
<td>X</td>
<td>Owned: $399</td>
</tr>
<tr>
<td>5. Steamers</td>
<td>1</td>
<td>2 years</td>
<td>&lt;1 year</td>
<td>X</td>
<td>Owned: $45</td>
</tr>
<tr>
<td>6. Handheld Steamers</td>
<td>2</td>
<td>2 years</td>
<td>&lt;1 year</td>
<td>X</td>
<td>Owned: $29/each</td>
</tr>
<tr>
<td>7. Steamers</td>
<td>1</td>
<td>4 years</td>
<td>1 year</td>
<td>X</td>
<td>Owned: $69</td>
</tr>
<tr>
<td>8. Cutting Shears</td>
<td>12</td>
<td>10+ years</td>
<td>Can resharpen for as long</td>
<td>X</td>
<td>Owned: ~$100/each</td>
</tr>
<tr>
<td>9. Rotary Cutter</td>
<td>2</td>
<td>&lt;1 year</td>
<td>Need to buy new blades for those</td>
<td>X</td>
<td>Owned: $70</td>
</tr>
<tr>
<td>10. Irons</td>
<td>4</td>
<td>2 years</td>
<td>Need to replace frequently</td>
<td>X</td>
<td>Owned: $40-100</td>
</tr>
<tr>
<td>11. Dress Forms</td>
<td>1</td>
<td>5 years</td>
<td>Broken and duct-taped</td>
<td>X</td>
<td>Owned: $199</td>
</tr>
</tbody>
</table>
II. Describe your sourcing process for key inputs. List your major suppliers by location, order quantity, frequency of use, and price

The main input I buy is fabric. Amazon and Ebay are the main online retailers for this. I visit local fabric stores regularly to browse and pickup fabric with unique and interesting designs. I visit local shops for maintenance on my equipment and buy new equipment from either online or local vendors.
Financial Analysis (for Established Businesses):

I. Operating Statement

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th></th>
<th>2018</th>
<th></th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Units</td>
<td>Average Price</td>
<td>Revenue</td>
<td>Units</td>
<td>Average Price</td>
</tr>
<tr>
<td>Jewelry</td>
<td>500</td>
<td>$7.75</td>
<td>$3,875</td>
<td>1,000</td>
<td>$7.75</td>
</tr>
<tr>
<td>Bow Ties</td>
<td>92</td>
<td>$38</td>
<td>$3,450</td>
<td>200</td>
<td>$38</td>
</tr>
<tr>
<td>Wedding Dresses</td>
<td>10</td>
<td>$500</td>
<td>$5,000</td>
<td>7</td>
<td>$500</td>
</tr>
<tr>
<td>Alterations</td>
<td>450</td>
<td>$17</td>
<td>$7,425</td>
<td>400</td>
<td>$17</td>
</tr>
<tr>
<td>Recreation</td>
<td>25</td>
<td>$98</td>
<td>$2,438</td>
<td>60</td>
<td>$98</td>
</tr>
<tr>
<td>Revenue</td>
<td>1,077</td>
<td>$22,188</td>
<td>1,667</td>
<td>$31,200</td>
<td>41%</td>
</tr>
</tbody>
</table>

|                  |          |          |          |          |        |
| Jewelry         | 500      | $3       | $1,375   | 1,000    | $3     | $2,750 |
| Fabric (by yard)| 1,200    | $2       | $2,400   | 1,200    | $2     | $2,400 |
| Equipment       |          |          |          |          |        |
| maintenance:    |          |          |          |          |        |
| (times equipment taken to shop) | 7 | $215    | $1,505   | 7        | $215   | $1,505 |
| Business use of Home |         |          |          |          |        |
| Costs           |          |          |          |          |        |
|                 |          |          |          |          |        |
| Profit          |          | $13,548  |          |          | $21,185 | 56%    |

II. Explain how you derived the seasonal variation in your cash flow:
Weddings and Proms increase during the spring and summer so there are more orders for bow ties and dresses in those seasons.
III. Provide a Debt Ratio: \(\frac{\text{monthly housing} + \text{monthly debt}}{\text{monthly income}}\) 
\[
(1400 + 300/2600) = 65\%
\]

IV. Provide a Housing Ratio: \(\frac{\text{monthly housing expenses}}{\text{monthly total income}}\) 
\[
(1400/2600) = 51\%
\]
**Future Planning/Ambitions**

I. **Do you have any ideas to adapt or modify for service/product offerings to increase sales or expand your business?**

I will focus particularly on expanding my sales in the bow tie and jewelry spaces. The margins in these spaces is very high. Since I launched So’Custom Bows & Tiez, I’ve been able to get unprecedented market traction in the bow tie space in a very short amount of time. I’d like to focus my resources on expanding that revenue stream in particular, and the distribution channels I have chosen to pursue will enable me to do that. I specifically would like to focus more on attracting larger orders, as the margins on these are higher and will allow me to accelerate my marketing and awareness efforts.

Partnerships are a key next step for my business. While I have thrived and gained traction going directly to my consumer, there is a large revenue potential in servicing organizations or groups who will make larger orders, such as churches, schools, and event management organizations. A particular focus is to position ourselves to be one of the first businesses that comes to mind when a wedding, anniversary, prom, graduation, or other event involving formalwear is in the works.

Due to my unique and creative designs, my products would be a welcome addition at any brick and mortar retail outlets. Having my products on the shelf at these retail outlets can be an additional revenue stream and marketing channel.

II. **If you have outlined a growth plan, describe how you plan to meet an increased demand?**

At the current stage and for the foreseeable future, I can continue to grow and operate without any additional labor.

III. **Have you explored future options for funding capital and inputs?**

Have not thoroughly explored other options, but LEND will remain an option if/when I reach the stage of being ready for a microloan.
## Grant Request

<table>
<thead>
<tr>
<th>Item:</th>
<th>Reason for Request</th>
<th>Links to Estimates</th>
<th>Estimated Expense</th>
</tr>
</thead>
</table>
| Computer               | To continue innovating in the design space and capitalizing on the uniqueness and customizability of my products, I will need design tools. In particular I will need software that will require a specific computer to operate. | 1) [Dell - XPS 13.3” Touch-Screen Laptop](Bought from Best Buy)   
2) [Dell XPS 13 InfinityEdge Touch Display Laptop](Bought from Dell)   
3) [Dell XPS 13 9380 13.3” Laptop Computer - Silver](Bought from Micro Center Computers and Electronics) | $1100 |
| Professional Industrial Sewing Machine | Much of the $1500 annual expense I pay towards equipment maintenance goes towards maintaining my current sewing machine. Getting a professional industrial sewing machine that is better able to handle my workload will significantly reduce these annual maintenance costs | 1) [Juki Industrial Lockstitch for Heavy Materials w/iKonix 0.5 HP Servo Motor, Table, LED Lamp](Bought from Amazon)   
2) [JUKI DDL-8700 High-Speed Single Needle Straight Lockstitch Industrial Sewing Machine With Table and Servo Motor](Bought from Gold Star Tool)   
3) [Juki DDL-9000C Series Industrial Sewing Machines with Table and Motor](Bought from Sewing Machines Plus) | $840 |
| Plus Size Dress Form   | A dress form is critical to the dressmaking and alteration process, but my current dress form is 5 years old and is literally falling apart. | 1) [Professional Missy Female Full Body Dress Form Tailor Dummy Mannequin Collapsible Shoulders Sizes 2-12](Bought from Amazon)   
2) [Professional Female Full Body Dress Form w/ Collapsible Shoulders and Legs](Bought from The Shop Company)   
3) [PGM Pro 605A Womens Ladies Professional Head to Toe Full Body Dress Form & Stand](Bought from AllBrands) | $500 |
| Professional Iron      | Normal irons generally need to be replaced frequently, so I’d like to invest in a professional iron that is higher quality and which has a longer lifetime | 1) [Rowenta Professional Iron](Bought from Target)   
2) [Rowenta Professional Iron](Bought from Home Depot)   
3) [Rowenta Professional Auto Shut Off Steam Iron](Bought from Walmart) | $60 |

Total Requested Grant: **$2500**
Certificate of Completion

This acknowledges that

Charrisse Roberson

has successfully completed Lending for Evanston and Northwestern Development’s Business Training Engagement Program.

On this day of June 17 2019

Femke Munting, LEND President
<table>
<thead>
<tr>
<th><strong>Applicant Name</strong> *</th>
<th>Rachel Holmes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Applicant Address</strong> *</td>
<td>[Redacted]</td>
</tr>
<tr>
<td><strong>Applicant Email</strong> *</td>
<td>[Redacted]</td>
</tr>
<tr>
<td><strong>Applicant Phone Number</strong> *</td>
<td>[Redacted]</td>
</tr>
<tr>
<td><strong>Business Name</strong> *</td>
<td>Confidence Now Consulting</td>
</tr>
<tr>
<td><strong>Business Website</strong></td>
<td><a href="http://www.iwearmi.com">http://www.iwearmi.com</a></td>
</tr>
<tr>
<td><strong>Business Address</strong></td>
<td>P.O. Box 1954, Evanston, Illinois 60201, United States</td>
</tr>
</tbody>
</table>

**Please provide a description of your business (500 words max)**

Confidence Now Consulting is a consulting agency whose focus is to make its clients' life, business, and love life better and not romantic love life but the life we were never taught about, with ourselves. Rachel Holmes, The Confidence Coach provide clients with the tools, strategies, and resources for them to take their lives to the next level.

Our mission is to align opportunities for our clients that will produce successful results.

**Services to be funded:**

- Tools/Equipment
- Licenses/certifications

**Do you need financial assistance with City licensing or permitting requirements?**

No

**Please describe how you intend to use Entrepreneurship Support Program funding to expand your business (500 words max)**

I intend to use the Entrepreneurship Support Program funding by eliminating the middle man which will help with overall overhead and business costs. I currently work off a loaner laptop which limits my capability for clients. I have been asked several times to participate in recordings and podcasts but haven't been able to due to my phone not giving me the options to do so. I'd even be able to start my own which would aide in business visibility. The Cricut machine will help with the creation of products that have been outsourced from other vendors. Due to this being a new business the LLC will aid with getting licensed and to lay the foundation legally.

**Upload business plan (.pdf or .doc) * **

- confidence_now_business_plan.pdf 190.07 KB · PDF
<table>
<thead>
<tr>
<th>Upload proof of residency or business location (lease, utility bill, bank statement, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1717_ashland_avenue_lease.pdf 311.46 KB PDF</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Upload proof of completion of a business training program (Community Business Academy or other) *</th>
</tr>
</thead>
<tbody>
<tr>
<td>lend_certificate.pdf 669.05 KB PDF</td>
</tr>
</tbody>
</table>

"I certify that all of the information contained in this document, all statements, information, and exhibits that I am submitting is true and accurate and to the best of my knowledge. I certify that I have reviewed the Program Guidelines associated with the City of Evanston's Entrepreneurship Support Program." (Type name below for signature).

<table>
<thead>
<tr>
<th>Date</th>
<th>Wednesday, July 10, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rachel Holmes</td>
<td></td>
</tr>
</tbody>
</table>
Business Plan

OWNERS: Rachel Holmes

Your Business Name: Confidence Now Coaching
Street Address: P.O. Box 1954
City, ST ZIP Code: Evanston, Illinois 60204
Telephone: (773)280-0536
E-Mail: coachrachel@iwearmi.com
# Table of Contents

I. **Professional Experience & Founding History** .................................................. 3
II. **Operating Structure** ......................................................................................... 4
III. **Market Analysis** .............................................................................................. 6
IV. **Marketing Plan** ................................................................................................. 7
V. **Management** ....................................................................................................... 15
VI. **Capital Summary and Sourcing** ..................................................................... 19
VII. **Financial Analysis [Start Ups]** .................................................................... 20
VIII. **Financial Analysis [Est. Businesses]** ............................................................ 21
IX. **Future Planning/Ambitions** .............................................................................. 22
Professional Experience & Founding History

I. Please list any and all of your relevant formal qualifications (i.e. business education, degrees, training certifications, LEND or Sunshine Academy engagement):

Completion of the following certifications:

Certified Life Coach Certification
LEND Business Certificate

Completed the following courses/trainings/workshops:

Crucial Conversations
Crucial Accountability
Sunshine Business Academy
Seven Habits of Highly Successful People

II. Please summarize your personal background and employment record; how did you get to where you are today?

I currently work in a healthcare setting that focuses on improving the quality of patient care. We provide proficiency testing for labs, doctor’s office and hospitals in order to ensure that they are testing patients accurately. It requires a lot of paperwork and good attention to detail. My profession has demonstrated that I have a solid understanding of the skills associated with processing paperwork. I enjoy the work that I do, but my passion lies in working with people in a more personal setting. My role has taught me how to manage multiple projects at once while maintaining a high quality level. I will transfer these skills to my confidence coaching work.

In the past I have mentored middle school and high school girls, coached friends and family through difficult challenges, and provided speaking services to businesses and schools. I focus primarily on developing confidence and the tools necessary to develop self-confidence. I have provided some of these services pro bono, but I have been compensated for the majority of them. I typically find these opportunities by word of mouth. I am also often asked back to speak or mentor again.

III. Briefly describe when, how, and why you formed the company and its development so far. How did you develop a passion for your current business?

I have been providing coaching services for many years, and I recently became certified as a Life Coach through the 365 Consulting Group. I completed this certificate under the mentorship of Dr. Karen Ratliff. I focused my training on confidence coaching. She has helped me put together a list of products and services. She also helped me grow my number of coaching clients.

I currently have three monthly clients. I provide them with in person coaching sessions as well as phone call coaching. I am also continuing to grow the number of speaking engagements that I partake in. I am expanding the number of corporate trainings that I provide on a monthly basis.

I have always been the go-to confidant for my friends and family and have provided them with countless pieces of advice about how to grow their confidence. I have realized that I thrive when I work with people. I have the
ability to empathize with my clients and understand their needs. The 365 Consulting program cemented my belief that I have a special ability to provide confidence coaching services.

**Operating Structure**

I. Please list and describe your present products and services offered, as well as hours and days of operation:

- **Coaching Services**
  - One-on-one coaching
  - Group coaching
  - Webinars
  - Speaking engagements
  - Business consulting (corporate coaching)

- **Products**
  - Devotionals
  - Books
  - Printable Downloads
  - Inspirational merchandise
    - Journals
    - T-Shirts
    - Mugs
    - Phone cases

- **Hours of Operation**
  - My hours of operation are flexible, but I tend to work between 10:00 a.m. and 7:00 p.m.

II. Please detail your pricing structure. Is it variable? (i.e. changing menu or product line)

   One-On-One Coaching Fee: $150.00 – Per Month (Four Weeks)
   Group Coaching Fee: $197.00 per participant (10 weeks/60 minute weekly calls)
   Business Consulting Fee: $297
   Speaking Engagements: TBD

III. How do you receive payment? (i.e. What is your system for processing credit cards? Are you cash only? Do you accept checks and, if so, what is the deadline for payment?)

   Payments are accepted via the following: Invoicing done via Square. Invoices are sent once contracts have been completed.

IV. How does your business model change over the course of the year? Is there a consistent customer flow or is there seasonal variation? If so, how do you address seasonal changes?
The training and coaching that I provide through middle schools and high schools in the Evanston and Wilmette area are subject to seasonal changes based on the school calendar. The summer months see a drop-off in the work that I do with speaking engagements, but I continue to coach girls through the summer months. I work with teachers who provide summer classes to mentor their students. I have found that coaching services pick up in January because people are motivated by the start of the new year. The services tend to be steady throughout the year, but drop off in November and December. People start saving for the holiday season for these two months which causes them to cut costs where they can. This means that they decrease their spending on life coaching and similar services. My speaking engagements also tend to drop off in November and December.

Like any business it is important to study and pay attention to the trends, whether it be season or whatever the new fad on social media is. Studying your audience, asking questions and staying engaged.

When it comes to the business model changing, my plan to address it would always be to be a quarter ahead. Making sure I have things already in place for when things shift so I’m not scrabbling to figure things out or come up with something.

i.e. Here’s my current focus:

Q3 – Branding (Building the like, know and trust amongst current clients and potential clients)
Q4 – Client Retention (focusing on providing strategies, resources and tools to keep clients coming back and spreading the word.

**Market Analysis**

I. What is your intended audience or demographic? Provide the geographic location of your customers and the type of customers you serve:

   Currently: African American woman ages 21-40 in the Chicagoland area.
   Vision: Woman of all demographic groups, globally, and of all age groups.

   i.e. Instagram: @phenomenal.ly

II. List firms you have identified as primary competitors in your market(s). Identify their strengths and weaknesses then describe how your company stands out:

   Christianne & Company LLC – Strengths: Overall expereince

   Life Coaching: Trish Blackwell – Strengths: consistency, following in place, programing available. Weakness: N/A
   Confidence Sales Person: Rachel Luna – Strengths: consistency, transparency, relatability
Products and Apparel: @phenomenal.ly (instagram handle) – Strength: celebrity following, seamless ordering process, established following. Weakness: Only a few designs.

III. Based on the geographic location of your business and the target demographics listed above, please provide an estimate for the total market size; in other words, how many unique potential customers exist in this space?

Total population of Chicagoland = 9.5 million people  
Number of people that are accessible = ~30% of the Chicagoland area (within reasonable driving distance)= 2.85 million people  
Percentage of population that is African American= 16.7% => 475,000 people  
Percentage of Women between 21 and 40 ~ 14% => 33,250

It is challenging to estimate the number of women who would require confidence coaching services, but in my experience almost all women can benefit from some form of life coaching in their lives. Twenty seven percent of Americans go for professional counseling at some point in their lifetimes. I estimate that 20% of the population I have mentioned will be willing to pay for confidence coaching at some point (if they become aware of my services). If I become more successful I will be able to take more clients from outside the Chicagoland area, but I have kept my market size estimate conservative.

Market size: 6650

IV. Considering the total market size and your primary competitors, estimate what percentage share of the market you currently occupy:

I believe I occupy approximately one percent of the total market share. That amounts to 66 customers a month. I do not currently have the capacity/ time to take on 66 clients, but it would be possible to reach that amount with a year or so of growth.
Marketing Plan

I. What marketing strategies have you used in the past? Which were most successful? Consider Pricing (discounts, bundles), Promotions, Product (variations to the services offered to keep customers engaged), Placement (where are messages most effective)

Based on the analytics provided via Wix (website provider) most of my clients, engagement and sales have all been done via Facebook/Social Media. Promotions, testimonials and including my audience in the process builds the like/know/trust factors with clients so they feel they have built it with me. Email Marketing has also been used.

II. Describe which demographics of the customer base and geographical area you will target with marketing in the future. Where is the greatest need for awareness?

Currently my main audience is are African American women between the ages of 21-45. In the future, I plan to serve women of all nationalities between the ages of 21-45. Women all of ages struggle with confidence so finding ways to service everyone is my overall focus.

III. What marketing strategies do you plan on pursuing going forward?

Future marketing strategies consist of purchasing social media ads, brochures that explain the services provided, remaining consist with email marketing to continue to build the like/know/trust amongst clients and followers and being more visual with recording of videos and podcasts.
Management

I. Describe your organizational structure. Please include key management roles and a list of employee responsibilities.

As the owner since it is the beginning phases of things, I’m currently the only person on my team. In the near future I would be adding interns to assist with following tasks:

1. Social Media Management
2. Client Management – CRM

II. How many employees do you have under contract: part-time and full-time?

None, currently just me.
## Capital Summary and Sourcing

### I. List the major operating equipment that your company owns or leases (feel free to add more items if required):

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Age</th>
<th>Condition/Description</th>
<th>Check One (X)</th>
<th>If Owned:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.Car</td>
<td>1</td>
<td>7y</td>
<td>Fair</td>
<td>X</td>
<td>$5000.00</td>
</tr>
<tr>
<td>2.Heat Press</td>
<td>1</td>
<td>-</td>
<td>Brand New</td>
<td>X</td>
<td>$300.00</td>
</tr>
<tr>
<td>3.Wireless Printer</td>
<td>1</td>
<td>-</td>
<td>Brand New</td>
<td>X</td>
<td>$200.00</td>
</tr>
<tr>
<td>4.Tripod</td>
<td>2</td>
<td>6m</td>
<td>New</td>
<td>X</td>
<td>$20.00</td>
</tr>
<tr>
<td>5. iPhone</td>
<td>1</td>
<td>1y6m</td>
<td>Good</td>
<td>X</td>
<td>$1000.00</td>
</tr>
</tbody>
</table>

### II. Describe your sourcing process for key inputs:

List your major suppliers by location, order quantity, frequency of use, and price
Financial Analysis (for Startups):

I. Outline all projected costs necessary:

<table>
<thead>
<tr>
<th>Monthly Expenditure</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rent Expense</td>
<td>$1700.00</td>
</tr>
<tr>
<td>Bank Fees</td>
<td>$12.00</td>
</tr>
<tr>
<td>Fuel/Gas</td>
<td>$300.0</td>
</tr>
<tr>
<td>Business Supplies</td>
<td>$150.00</td>
</tr>
<tr>
<td>Merchandise Production Costs</td>
<td>$100.00</td>
</tr>
<tr>
<td>Rented Equipment</td>
<td>$0</td>
</tr>
<tr>
<td>Facilities/Repairs</td>
<td>$0</td>
</tr>
<tr>
<td>Utilities</td>
<td>$200.00</td>
</tr>
<tr>
<td>Employees</td>
<td>$0</td>
</tr>
<tr>
<td>Charitable Giving</td>
<td>$100.00</td>
</tr>
<tr>
<td>Other</td>
<td>$0</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES:</strong></td>
<td><strong>$2562.00</strong></td>
</tr>
</tbody>
</table>

This includes both personal and business expenses. The business expenses alone are:

Bank Fees: $12.00 (I have a business account which requires extra fees)
Business Supplies: $150.00 (I purchase books and supplies for my clients. I cover these additional expenses so that I can ensure the best results.)
Merchandise Production Costs: $100 (This is the money that I spend per month on the

Total Business Expenses: $257

II. Provide an overview of all revenue streams, by month, for the past year:
Employment full-time/part-time, speaking engagements, product sales, coaching clients.
III. Provide an overview of any outstanding Debt, Loans, or Lines of Credit:
   Business- none, Personal - Student Loans that are covered by my current employment.

IV. Based on projected costs, provide a breakeven analysis to estimate the number of customers you need to exceed in order to be profitable on a monthly basis:

9-10 customers per month (at $150 per month, assuming that I transition to doing coaching as my full-time job).
2 business consulting courses per month- $600
2 speaking engagements per month- revenue depends, typically between $200 and $300

If I do not transition to doing coaching full-time, I can cover my monthly expenses for the business by maintaining two or three clients per month. Any business consulting or speaking engagements will then be additional revenue that I can save to help grow the business.

V. How does this figure compare to the total market size (Part 3-V) and your estimated share of this market? What is the margin of error to breakeven?

Two or three clients a month would amount of 0.045% of the total market share. That is far below my estimated 1% market share occupation. Ten clients would occupy approximately one sixth of a percent, which would still be well within my predicted total sales.

**Future Planning/Ambitions**

I. Do you have any ideas to adapt or modify for service/product offerings to increase sales or expand your business?

   - Online coaching programs
   - Completing my book – estimated August 2019
   - Business consulting – corporate trainings (Confidence In The Workplace)
   - Training others to become certified as a coach
   - Products (Shirts, journals, mugs, bracelets, refrigerator magnets)

II. If you have outlined a growth plan, describe how you plan to meet an increased demand by growing your labor force?

   Once my coaching/consulting business gets to where it came supplement my income, I plan to quit my 9-5 and coach full time. Leaving my job will free my time to grow and expand my business.

III. Have you explored future options for funding capital and inputs?

   Not at this time.
<table>
<thead>
<tr>
<th>Service Requested</th>
<th>Proposed Vendor</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laptop – Lenovo Ideapad 15.6 HP</td>
<td>Amazon.com (<a href="https://www.amazon.com/s?k=Laptop+%E2%80%93+Lenovo+Ideapad+15.6+HP&amp;ref=nb_sb_noss_2">https://www.amazon.com/s?k=Laptop+%E2%80%93+Lenovo+Ideapad+15.6+HP&amp;ref=nb_sb_noss_2</a>)</td>
<td>$368.00</td>
</tr>
</tbody>
</table>
| Laptop – Lenovo E580                          | High Proformance Computers  
622 Grove Street Evanston, Illinois 60201  
(847)475-9883                                      | $799.00 + $199.00 Warranty |
| Laptop – XP X360 Convertible Touchscreen Chromebook | Target – Evanston Center  
2209 Howard Street Evanston, Illinois 60202  
(847)733-1144                                    | $259.00                   |
| Blue Microphones                              | Amazon.com (https://www.amazon.com/Blue-Snowball-Condenser-Microphone-Cardioid/dp/B014PYGTUQ/ref=sr_1_3?keywords=Blue+Microphones&qid=1562553287&s=gateway&sr=8-3) | $74.99                    |
| Blue Microphones – Yeti USB Multi-Pattern Electret Condenser Microphone | Best Buy  
2301 Howard Street Evanston, Illinois 60201  
(847)570-0450                                      | $129.99                   |
| Blue Microphones – Yeti USB                   | Staples  
1509 Waukegan Road Glenview, Illinois 60025  
(847)832-0283                                    | $109.99                   |
| Cricut Maker, Champagne                       | Amazon.com (https://www.amazon.com/Cricut-2003925-Maker-Champagne/dp/B072VYPWM4/ref=sr_1_1_sspa?keywords=Cricut+Maker%2C+Champagne&qid=1562552187&s=gateway&sr=8-1-spons&psc=1) | $369.00                   |
| Cricut Maker                                  | Blick Art Materials  
1755 Maple Avenue Evanston, Illinois 60201  
(847)425-9100                                      | $399.99                   |
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cricut Maker</td>
<td>Michaels 7055 Central Avenue Skokie, Illinois 60077 (847)410-0280</td>
<td>$349.00</td>
</tr>
<tr>
<td>4. LLC Articles of Organization Fee</td>
<td>State of Illinois</td>
<td>$250.00</td>
</tr>
</tbody>
</table>

Total Requested Grant: $2000.00
On this day of July 9th, 2019

Certificate of Completion
This acknowledges that

Rachel Holmes
has successfully completed Lending for Evanston and Northwestern Development’s Business Training Engagement Program.

Femke Munting, President of LEND
Memorandum

To: Chair and Members of the Economic Development Committee

From: Johanna Leonard, Community Development Director
Paul Zalmezak, Economic Development Division Manager
Paulina Martínez, Assistant to the City Manager

Subject: Equity in the Arts Hiring Program – Mudlark Theater

Date: July 19, 2019

Recommended Action:
Staff supports a recommendation from the Economic Development Committee to City Council for approval of financial assistance through the Equity in the Arts Hiring Program for Mudlark Theater NFP, for a second and final year at $25,000.

Funding Source:
Staff recommends utilizing the Economic Development Workforce Development Fund (account #: 100.21.5300.62663). The approved 2019 Fiscal Year Budget allocated $100,000 to this account. To date, $12,602.10 has been spent, leaving a remaining balance of $87,397.90.

Summary:
Staff recommends funding a second year of Equity in Arts funding for Mudlark Theater to support their newly created Director of Development position. Mudlark Theater has successfully completed the first year of the grant and met many of the goals proposed:

- Board member diversification
- Revision of need-blind scholarship program
- Outreach in minority communities
- Diversification of volunteer members
- Strategic plan for sustaining the position long-term

The Director of Development reports to, and collaborates closely with, the Executive Director, and is a key member of the senior management team responsible for creating Mudlark’s long-term strategy. The Director of Development responsibilities include:

- Develop goals and strategies to execute Mudlark’s annual fundraising plan
- Secure financial support from individuals, foundations, and corporations
- Oversee the administration of donor mailing list and database
- Develop and maintain ongoing relationships with major donors
- Solicit and coordinate local business sponsorships
- Coordinate in-kind donations
- Ensure proper acknowledgement of all gifts
- Develop and track grant proposals

Filling the role of Mudlark Theater’s Director of Development (upon receiving the grant in 2018) is Daisy Copeland, who identifies as a woman of color of mixed ethnicity and nationality who is a resident of Evanston’s 5th Ward. Ms. Copeland is an active volunteer tutor for Books & Breakfast, has participated in SEED, Beyond Diversity, and completed EC2C’s Advocates for Action Leadership Training.

Background
In November 2017 the Economic Development Committee recommended a the City Council to approve the application for Mudlark Theater to receive the Equity in the Arts hiring program awards, which provided them with a $25,000 grant to diversify their management staff to consequently work towards operationalizing equity in the organization. This program called to be evaluated at the end of the first year, to give the same organization the opportunity to receive an additional $25,000 for a second year. This program requires the recipient organization to match the funds received. The program guidelines are summarized as follows:

Eligibility:
- Business located in Evanston
- 501©3 IRS
- Evanston minority residents between the ages of 18 and 65

Term:
- 12 months with the option to extend for an additional 12 months.

Position Description:
- Must be an administrative or professional position in management, communications, development, finances, volunteer management, or administrative support.
- Ineligible positions include housekeeping, janitorial, maintenance, or class instructors.

Attachments:
- Mudlark’s Original Application
- Mudlark’s Report
### Applicant Information

<table>
<thead>
<tr>
<th>Legal Name of Applicant Organization</th>
<th>Mudlark Theater Company, NFP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year Founded</td>
<td>2005</td>
</tr>
<tr>
<td>Tax ID Number</td>
<td>36-4573236</td>
</tr>
<tr>
<td>Daytime Telephone</td>
<td>(847) 448-0708</td>
</tr>
<tr>
<td>Street Address</td>
<td>1417 Hinman Ave Evanston, IL 60201</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:headquarters@mudlarktheater.org">headquarters@mudlarktheater.org</a></td>
</tr>
<tr>
<td>Website Address</td>
<td><a href="http://www.mudlarktheater.org">www.mudlarktheater.org</a></td>
</tr>
</tbody>
</table>

### Organization Information

<table>
<thead>
<tr>
<th>Chief Administrative Officer</th>
<th>Michael Miro</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daytime Phone</td>
<td>(847) 912-5342</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:michael@mudlarktheater.org">michael@mudlarktheater.org</a></td>
</tr>
<tr>
<td>Person Completing Application</td>
<td>Michael Miro</td>
</tr>
<tr>
<td>Daytime Phone</td>
<td>(847) 912-5342</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:michael@mudlarktheater.org">michael@mudlarktheater.org</a></td>
</tr>
<tr>
<td>Total expenditures for the last completed fiscal year:</td>
<td>500676</td>
</tr>
<tr>
<td>Total revenues for the last completed fiscal year:</td>
<td>533718</td>
</tr>
</tbody>
</table>

### Summary of Application

<table>
<thead>
<tr>
<th>What is the title of the position you are creating or filling?</th>
<th>Director of Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the total annual salary you will offer?</td>
<td>$50,000</td>
</tr>
</tbody>
</table>
| Please describe the position, including job responsibilities, objectives and tasks. | The Director of Development is responsible for creating and overseeing a comprehensive development plan. Chief responsibilities include securing major gifts from new and existing individual major donors, cultivating grants and corporate sponsorships, event planning and oversight, and managing development staff.

The Director of Development reports to, and will collaborate closely with, the Executive Director, and is a key member of the senior management team responsible for creating Mudlark’s long-term strategy.

Responsibilities/Tasks
1) Develop goals and strategies to execute Mudlark's annual fundraising plan
2) Secure financial support from individuals, foundations, and corporations
3) Oversee the administration of donor mailing list and database
4) Develop and maintain ongoing relationships with major donors
5) Solicit and coordinate local business sponsorships
6) Coordinate in-kind donations
7) Ensure proper acknowledgement of all gifts
8) Develop and track grant proposals |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Please explain how hiring to diversity in this position will help your organization reach its overall inclusion and equity goals.</td>
<td>Hiring a person of color as Director of Development is a crucial piece of Mudlark's larger diversity initiative. Mudlark's workforce comprises two main groups: a small, salaried staff and a large roster of contract workers (after-school and summer teaching artists, guest directors, and playwrights). The contractor group has diversified considerably in the last two years. Today, 25% to 30% of the artists working at Mudlark are people of color. But diversity is lagging at the staff and board levels. Our staff is only 10% minority, and our nine-person board is all white. Adding a person of color as Development Director will diversify not just the staff, but the inner circle of decision makers at Mudlark. Meanwhile, we are working to recruit six new board members, with racial diversity as a top priority. As the diversity initiative progresses, Mudlark's circle of contacts and community partners will continue to widen, accelerating and strengthening our outreach efforts.</td>
</tr>
</tbody>
</table>
How do you plan to solicit or recruit candidates for this position?

To cast a wide net, Mudlark will place job postings about the position on sites that specialize in non-profits and arts administration, with language that welcomes and encourages candidates of color. Locally, we will take a more targeted approach, leveraging Mudlark's connections in the Evanston non-profit community to get recommendations and find candidates. Thanks to our success on the diversity initiative so far, new channels of connection to Evanston's black communities have opened that will help us in our search. Our most recent mainstage production, I.D., a show about race in Evanston with a predominantly black cast, is attracting interest and enthusiasm from community and church leaders, artists, and activists of color. Having the trust of gatekeepers in the black community means we will be more likely to find a candidate who is not only highly qualified, but familiar with Mudlark's work and excited to help us further our mission and reach our inclusion goals.

Projected post date for position: Jan 02, 2018 09:00 AM
Projected start date for position: Feb 15, 2018 09:00 AM

Positional Information

1. What benefits do you offer full time employees? (paid time off, insurance, etc.)

Although we currently are unable to offer health insurance or 401k opportunities for our employees, we are completing a strategic planning process that has identified the need to add a benefits package over the next three years to attract and retain high performing staff. For now, we do offer paid time off to all of our employees and work to ensure maximum schedule flexibility whenever possible.

2. What goals and programs do you have planned for the 2018 season?

Programs: In 2018, we will strive to maintain or slightly exceed our 2017 program offerings. This includes after-school classes at 25 area schools and 60 sections of summer camps exploring a wide range of theater activities: improv, scene study, stage combat, puppetry, makeup, costume design, etc. The other main component is our season. With five shows on our Mainstage and six on our smaller Studio stage, Mudlark will engage over 200 young performers in artistically ambitious, original productions that focus on young people and their experiences. Every play we produce is either a world premiere or one that originally debuted at Mudlark.

Our 2018 goals include implementing Mudlark's first-ever Strategic Plan; continuing to diversify our participant base, artists, staff and board; producing more plays that represent marginalized and minority voices; exploring new community partnerships; creating a culture of professional development with better training for our employees and staff; and establishing a successful major gifts program.
3. The grant is for a two-year period. What is your plan to extend the position after the grant term is complete?

The position of Development Director is undeniably vital to any non-profit of Mudlark's size, and we plan for the new hire's tenure to extend beyond the grant period. As we will outline in our forthcoming strategic plan, Mudlark aims to raise its annual contributed income total from $200,000 to $300,000 over the next three years. This rise—which will be fueled not only by the new Development Director but by strong board development and an ambitious major gifts program (thanks to a grant and training from the Evanston Community Foundation)—will provide the funding to afford the salary for the position after the grant period ends. This, in addition to continued programmatic growth, will ensure that the Development Director position is secure.

4. How will your project be managed? How will the qualifications and make up of your board and staff help you achieve the goals of this project?

Integrating a full-time Director of Development into our staff structure will not be a challenge, since a form of the position already existed. Mudlark employed a part-time Development Director from summer 2015 to September 2017. In re-filling the position, we are acknowledging that the size of the job has grown along with the organization, and are therefore upgrading it to full-time. The new Director will have a Development Associate, Emily Wills, who reports directly to them and can help orient them to our development infrastructure, database, and current activities. Mudlark's board and staff help create a smooth transition for the new staff member by introducing them to important donors and community partners.
### 5. How does your organization currently impact underserved communities of Evanston?

The year 2017 has been a big one for Mudlark in terms of our impact on the underserved. While Mudlark has always maintained a need-blind scholarship policy for its fee-based programs, this summer we stepped it up through a partnership with Family Focus and our outreach consultant, William Eason. Our summer 2017 scholarship program provided 15 underprivileged children from the Family Focus summer program with $9,500 worth of scholarships and transportation to take part in Mudlark’s summer camps and productions. Feedback from participants and their families was overwhelmingly positive.

This fall, we partnered again with Mr. Eason and his theater company, The Art of Evolution, to produce Mudlark’s first-ever co-production. I.D. is a series of original vignettes about racial and cultural identity in Evanston as told through the lens of a diverse group of young people. The 10 Art of Evolution company members in the cast received the full experience of being in a Mudlark show without having to pay the usual participation fee. The cast, which is our most diverse ever, and subject matter, which examines racial justice, is also drawing the most diverse audience we have ever had at a show and sparking needed conversations in the community.

All this is happening against a backdrop of increasing diversity in our hiring practices and continued partnerships with Y.O.U. and District 65 after-care programs to engage underserved kids in free creative writing and improv workshops.

### 6. Give us the big picture of how adding this position will affect your organization and the work you do.

Recruiting an effective Director of Development at this juncture is pivotal to achieving Mudlark’s development goals. As we approach the limits of how many camps and classes we can run given our staffing and spatial capacity, a lot of our future growth must come from contributed income. This year, Mudlark was selected by the Evanston Community Foundation to participate in a major gifts challenge that requires us to raise $25,000 in major gifts for the next two years. This will be a big challenge, and having a strong Development Director to lead us will ensure that we meet our goal.

Hiring a person of color for the position will further broaden our horizons in terms of the work we do, the connections we foster, and the opportunities we pursue. A person of color in the inner circle of decision makers will guide Mudlark toward new ideas and new perspectives, inspiring positive changes not just in how we raise money, but in the programs and projects we pursue to attract that money.
6. Give us the big picture of how adding this position will affect your organization and the work you do. - Copy

Recruiting an effective Director of Development at this juncture is pivotal to achieving Mudlark’s development goals. As we approach the limits of how many camps and classes we can run given our staffing and spatial capacity, a lot of our future growth must come from contributed income. This year, Mudlark was selected by the Evanston Community Foundation to participate in a major gifts challenge that requires us to raise $25,000 in major gifts for the next two years. This will be a big challenge, and having a strong Development Director to lead us will ensure that we meet our goal.

Hiring a person of color for the position will further broaden our horizons in terms of the work we do, the connections we foster, and the opportunities we pursue. A person of color in the inner circle of decision makers will guide Mudlark toward new ideas and new perspectives, inspiring positive changes not just in how we raise money, but in the programs and projects we pursue to attract that money.

Demographic Information

| Total Number of Paid Staff (including artists) | 10 |
| Number                                      | 10 |
| Total Number of Board Members               | 9  |
| What percent of your board would currently identify as non-white/caucasian? | 0  |
| Total Audience/Attendees/Readers            | 6000 |

Please describe the methods you use to collect information about your staff and audience numbers and demographics.

Demographic information about program participants is collected using registration forms. We also track school demographic information to assess whether our in-school programming is covering as diverse a range as possible.

Regarding financial demographics, when parents apply for scholarships, they fill out a form explaining why they need the scholarship and state whether they are eligible for federal free or reduced lunch. Of those families that request scholarships, most qualify for free or reduced lunch, while the remainder are experiencing temporary hardship (recent job loss, death in the family, etc.)

We track audience demographics with surveys emailed to ticket buyers.

Staff/Board demographic information is tracked with a voluntary self-identifying race/ethnicity form.

Finances

### Uploads

<table>
<thead>
<tr>
<th>One-page description of key personnel (artistic and administrative, paid and/or volunteer) which includes job title, workload (e.g. full-time or part-time) and brief career summary Current list of officers and board members, with addresses for each.</th>
<th><a href="https://s3.amazonaws.com/files.formstack.com/uploads/1864132/28805399/364273058/28805399_key_personnel.pdf">https://s3.amazonaws.com/files.formstack.com/uploads/1864132/28805399/364273058/28805399_key_personnel.pdf</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Link 1</td>
<td><a href="https://www.youtube.com/watch?v=JvL5Ub_3uVA&amp;t=7s">https://www.youtube.com/watch?v=JvL5Ub_3uVA&amp;t=7s</a></td>
</tr>
</tbody>
</table>
How has this position contributed to understanding not only diversity and inclusion but equity itself?

Mudlark’s Development Director identifies as a woman of color of mixed ethnicity and nationality who is a resident of Evanston’s 5th Ward. She brings to our inner circle of decision makers a fresh perspective and first hand insight into what it is to be an Evanstonian raising children of color. She is a leader in several parent groups for equity who has organized several race and equity related programs. She is an active volunteer tutor for Books & Breakfast, has participated in SEED, Beyond Diversity, and completed EC2C’s Advocates for Action Leadership Training.

At Mudlark, the pursuit of equity is an intentional and ongoing practice to provide access to high-quality theater education programming to children who may not otherwise be able to access it. Mudlark has always maintained a need-blind scholarship policy for its fee-based programs. In 2018, we provided over $40K in scholarships to families with financial need, and as of July 1, 2019 we’ve already provided over $36K in scholarships. However, our Development Director has helped lead our efforts to apply an equity lens on issues beyond cost. With her help, we are working to identify and eliminate biases and barriers that may limit the participation of children in our programs. We are now planning to offer programming at community centers that serve children who may not have transportation to our headquarters or who can’t stay at their after school programs due to bussing and scheduling gaps. Furthermore, once children have access to Mudlark, we recognize that equity means ensuring that their experience is safe, welcoming and positions them to build relationships with other children across differences.

How has this position helped the organization diversify its programming and therefore its audience? How was the equity lens been applied? How have you built capacity on issues of equity?

The Development Director has had significant influence and impact on improving diversity and equity in Mudlark’s programs. Her positive relationships within Evanston’s African American parent community have widened Mudlark’s circle of contacts and community partners, accelerating and strengthening our outreach efforts. She has helped establish a partnership with the Shorefront Legacy Center to produce an original play about Evanston’s history of school desegregation, Foster School: A Living History. Through the development of this play, we are fostering new relationships with organizations like the Fleetwood Jourdain Theater and Family Focus Evanston. Our Development Director was also Mudlark’s liaison with community members (both white and African American) who were interviewed about their experiences as children who lived through desegregation in Evanston during the 1960s and 1970s. Thanks to
her outreach, several of those community members are offering to help Mudlark reach their networks as well.

Mudlark also plans to include after-school programs at the Fleetwood Jourdain Community Center this fall, in partnership with the North Shore Choral Society. Our Development Director is also in search of funding to implement Creative Improv classes for the children at Family Focus’ after school program, and to renovate to our Red Curtain Theater space in the First Congregational Church House building to ensure the theater is more accessible.

As a result of her outreach, a wider diversity of parents are now volunteering on various committees and projects that had not been volunteering before. As an example, the composition of the planning committee for Mudlark’s annual benefit, Larkabout, is historically comprised of white mothers with the financial capacity to sponsor the event and access to other donors with capacity. This year, thanks to her relationship building, three new women who were not previously involved with Larkabout have joined the committee. One is a long time scholarship recipient and single mom raising two boys. She has joined the committee to offer her expertise around graphic design. Also, two African-American mothers have joined the planning committee providing volunteer support for Mudlark, regardless of their personal capacity to sponsor the event. Prior to this, their children were involved in programming, but they weren’t personally engaging in parent volunteering. Now they are actively partnering with the Development Director to foster relationships with black-owned businesses and black-led organizations, as prospective sponsors for both Larkabout and Foster School: A Living History, to increase public awareness of Mudlark’s programming for children, and to lend their perspectives to the overall planning of the event.

She has also helped Mudlark recognize the opportunity to practice equity in fundraising. Last fall, we redesigned Larkabout as a party featuring pop-up theatrical performances at Temperance Beer Company. Ticket prices were lowered to under $100 so a wider diversity of people could afford to attend the event, while the venue and show proved to be more engaging for our guests than the traditional gala dinner experience. Going into the 2019-2020 season, we are planning donor cultivation events for VIPs that will include not only major gift donors but all consistent donors, regardless of gift size, our volunteers, and strong community partners. We want Evanston to know that Mudlark values all of its supporters, and that each of their voices matters to us.

Finally, prior to the hiring of the Development Director, diversity was lagging at the staff and board levels at Mudlark Theater. However, our once all white nine-person board is now twelve people, including two women who identify as African American, and another who identifies as
Hispanic white. We are working to recruit at least three additional new board members, with racial diversity continuing as a top priority.

Diversity, Inclusion, and Equity Training

Since Daisy joined Mudlark, the staff and board has completed a variety of diversity, inclusion and equity trainings. Last month, the entire staff, including the high school students who work as Camp Counselors in Training, participated in an Implicit Bias workshop facilitated by Makeba Boykins, a Diversity & Inclusion consultant. Our new Executive Director, Maureen Powers, recently completed SEED (Seeking Educational Equity and Diversity), which is part of a national program designed to create community, grow learning, and develop personal and organizational change toward greater equity and diversity. (Daisy is also a graduate of the EC2C’s SEED 2017 Evanston Cohort 1A). In April, Daisy attended the YWCA’s Equity Summit, where she participated in the Latinos Progresando’s workshop, Community-based Advocacy: Engagement Strategies for Equity, and Kaleidoscope Group’s workshop titled A Way Forward for Organizations: A Strategic Approach to Achieving Equity. Soon after attending the summit, the board of directors adopted Daisy’s proposal to establish an Equity Leadership Team. The team’s priorities will include publishing Mudlark’s Equity Statement and adopting a Racial Impact Assessment Tool to further evaluate and improve programs and operations. The Board of Directors and Mudlark’s senior staff are working to identify parents and community members who may serve on the Equity Leadership Team, which we hope to launch before the year’s end. Through the ECF’s Nonprofit Workshops, Board President Judy Kemp and board member Don Dunbar, along with Maureen and Daisy, participated in the workshop, Building a more Equitable Institution, presented by the YWCA’s Equity Institute. Together, our Education Director, Dru Smith and Associate Education Director, Felix Mayes completed a training titled Mental Health First Aid, a supplement for trauma-informed counseling for youth, which was provided by AMITA Health, in partnership with Americorps. Our Associate Managing Director Lucinda Allen attended trainings provided by the Chicago Cultural Accessibility Consortium (CCAC) which provides information and resources to help nonprofits with providing services for patrons with disabilities: Tips from the LEAD Conference and the Accessible Services Showcase. Finally, the staff was provided a training presented by Carrie Shonk, whose services we’ve retained. She is Mudlark’s on-call social worker providing support as needed to instructors this summer. Her training raised the staff’s awareness of behaviors one might see in different age groups of children with various learning disabilities and/or non-neurotypical behavior, along with specific strategies for behavior management.
Planning for a Sustainable Position

The position of Development Director is undeniably vital to any non-profit of Mudlark’s size, and we plan for our Development Director’s tenure to extend beyond the grant period. Mudlark could not have hired this senior-level position without this grant and the two-years it provides to raise funds for the salary. However, the two-year period has allowed us to grow and prepare to fully fund the salary at the end of the grant term. Since our Development Director was hired, Mudlark has successfully launched a Major Gifts program and achieved the Evanston Community Foundation’s Building the Future matching gift challenge. Mudlark aims to raise its annual contributed income total to $300,000 over the next two years. This rise—which will be fueled not only by the Development Director but by strong board development and an ambitious major gifts program—will provide the funding to afford the salary for the Development Director position after City of Evanston Equity in the Arts grant period ends. This, in addition to continued programmatic growth, will ensure that the Development Director position salary is sustainable.

Professional Development Impact

Since joining Mudlark, our Development Director has gained access to new professional development opportunities, including the 2019 Evanston Community Foundation’s Non-profit workshops and Building the Future workshops, a two-day course on Advancing Fundraising: Accelerating Your Development Strategy with Kellogg’s Nonprofit Executive Education program, the YWCA’s Equity Summit, and continues to receive one on one coaching with a development consultant, Marc Hilton. She’s also applying for the Evanston Community Foundation’s next Leadership Evanston cohort with the financial support of an anonymous donor and an ECF scholarship, and participates in the monthly breakfast meetings for Evanston’s Development Professionals. Her peer relationships encouraged her to recently join Women in Development North, a North Shore-based network for development professionals. She reports that Mudlark’s flexible work schedule, medical benefits, and the ability to work from home as needed have made it easier to support her household.

We look forward to answering any questions from the committee. We are so grateful for the support the City of Evanston’s Equity in the Arts Hiring Grant, and its commitment to diversity, inclusion, and equity.

Maureen Powers, Executive Director
Daisy Copeland, Development Director
To: Chair and Members of Economic Development Committee

From: Johanna Leonard, Community Development Director
Paul Zalmezak, Economic Development Division Manager

Subject: Financial Wellness Initiative

Date: July 18, 2019

Discussion:
On April 24, 2019, at the request of Alderman Rue Simmons, Economic Development staff presented intention to coordinate a financial wellness initiative with private sector partners. The initiative would provide personal finance education to assist Evanston residents with building wealth to enable participation in capital and credit markets. Specifically, personal financial wellness education should lead to increased levels of business startup activity and home ownership, decreased debt, and overall improved community health resulting from financial stress reduction.

Upon conducting further research, staff recommends the City to issue a Request For Proposals (RFP) seeking a partnership with a qualified entity who will provide the financial wellness curriculum at no charge to City of Evanston residents. The City of Evanston will not offer financial assistance for the curriculum delivery. However, the City of Evanston will partner exclusively with the selected candidate by offering:

- Co-branding
- Marketing
- Advertising in City of Evanston communications including newsletters and websites.
- Use of City of Evanston facilities including the Civic Center, Levy Center, and Gibbs Morrison Cultural Center to teach the curriculum.
- Co-authoring grant applications (if applicable)
- Creation of a dedicated program micro-website

An ideal candidate would be a bank, credit union, or a mission-oriented financial service firm or organization that provides financial wellness services. Candidates will have an established financial wellness initiative or curriculum in place with a proven track record.
of success. By limiting it to one provider, staff will better be able to manage deliverables, track outcomes, and direct participants to a consistent program.

It is anticipated that the financial wellness initiative would include programming such as pre-purchase homebuyer counseling, down payment assistance, retirement savings, debt management, credit education, budgeting, and understanding financial services. Specifically, personal financial wellness education should lead to increased levels of business startup activity, decreased debt, increased home ownership, and overall improved community health resulting from stress reduction.

The program will be open to all City of Evanston residents, with priority given to low- to moderate-income residents. A system for determining eligibility will be determined in partnership with successful respondent. An ideal curriculum will result in some form of recognition such as a certificate of completion or badging system.

Background
What is financial wellness? The Consumer Financial Protection Bureau (CFPB), the U.S. government agency responsible for consumer protection in the financial sector, defines financial well-being as "a state of being wherein you:

- Have control over day-to-day, month-to-month finances;
- Have the capacity to absorb a financial shock;
- Are on track to meet your financial goals; and
- Have the financial freedom to make the choices that allow you to enjoy life."

---

Memorandum

To: Chair and Members of Economic Development Committee

From: Johanna Leonard, Community Development Director
Paul Zalmezak, Economic Development Division Manager
Katie Boden, Economic Development Coordinator

Subject: Changes to Business Licensing

Date: July 18, 2019

Discussion

On September 26, 2018, Economic Development Committee supported a recommendation from staff to update the City Code to replace current business licensing requirements for non-food establishments with a business registration program. The Business Registration process was approved by the City Council in October 2018.

The business registration will serve multiple purposes, for example, communicating with businesses has proven difficult in the past in cases of emergency (e.g. crime alerts, snow emergencies). Building occupant data (e.g. owner contact info, total # of employees, etc) is also important to police and fire in the event of an emergency, and to make sure that buildings being occupied by our businesses are in safe working conditions. Minority, Women, and Evanston-based Enterprises data will be beneficial to businesses as we announce procurement opportunities, networking and training events. Additionally, a complete list of businesses will allow the City to analyze data about commercial real estate and local businesses to better serve economic development planning.

In summary, all for-profit commercial entities, including home-based businesses, will be required to register on an annual basis. The registry will include business owner and property owner contact information, number of employees, business classification, and MWEBE status. Upon registering, each business will be issued a registration certificate, similar to the annual business license certificate that is currently issued. This will provide participating businesses with additional documentation of their location and activities that can be used to support membership in professional associations or efforts to obtain insurance or certifications, such as DBE/WBE/MBE. Many home-based businesses have requested such documentation from the City in the past.

Staff estimates there are approximately 4,400 commercial enterprises in Evanston, not including the estimated 500 food establishments. Staff is currently licensing 520 businesses generating $53,000 in fees. Based on current State of Illinois data, staff estimates the potential for an additional $200,000 in registration revenue with the proposed changes, as summarized in the table below.
Projected Revenue from Evanston Business Registry

<table>
<thead>
<tr>
<th>Est. # Entities</th>
<th>2018 Fees</th>
<th>2019 Est. Fees *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current EntitiesLicensed</td>
<td>520</td>
<td>$53,000</td>
</tr>
<tr>
<td>Add'l Professional Services</td>
<td>1,400</td>
<td>$0</td>
</tr>
<tr>
<td>Add'l Home Based</td>
<td>2,500</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4,420</strong></td>
<td><strong>$53,000</strong></td>
</tr>
</tbody>
</table>

* Actual to be determined based on accuracy of State of Illinois database. This estimate reflects higher end of range based on $100 average fee for non-home based, and $25 for home based.

Staff has completed its review of the City Code and has recommended changes to accommodate the proposed business registration process. Changes to the City Code will be presented in an ordinance to be considered by the City Council in the Fall. The business registration process will be implemented with notices mailed in November of 2019, with 2020 business registration payments due December 31, 2019. A brief summary of changes include:

1. Replace “business license” with annual business registration:
   - All for-profit entities would be required to register and pay an annual fee, including home-based businesses and occupations licensed by the state
   - Food establishments continue to be licensed exclusively by the health department
   - Building contractors continue to be registered by Building & Inspections division (home-based or out-of-town landscape contractors would still register)
   - Fire/life safety inspections will continue to be required for new businesses operating in commercial space, as well as changes of ownership

2. The proposed simplified business registration fee schedule is summarized in the table below:

**Business Registration Fee Schedule**

<table>
<thead>
<tr>
<th>Description</th>
<th>2020</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home based business registration [1]</td>
<td>$25.00</td>
<td>$25.00</td>
</tr>
<tr>
<td>Non-profit enterprises</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Landscape contractors not maintaining a place of business within the City</td>
<td>$50.00</td>
<td>$40.00</td>
</tr>
<tr>
<td>Business with a gross floor area of 0 — 3,000 square feet</td>
<td>$75.00</td>
<td>$75.00</td>
</tr>
<tr>
<td>Business with a gross floor area of 3,001 — 10,000 square feet</td>
<td>$150.00</td>
<td>$150.00</td>
</tr>
<tr>
<td>Business with a gross floor area in excess of 10,000 square feet</td>
<td>$250.00</td>
<td>$250.00</td>
</tr>
<tr>
<td>Pop-up Retailers (less than 180 days in operation)</td>
<td>$35</td>
<td>N/A</td>
</tr>
<tr>
<td>Movie Theater</td>
<td>$0.95 per seat</td>
<td>$0.95 per seat</td>
</tr>
<tr>
<td>Initial license application fee</td>
<td>$50.00</td>
<td>$50.00</td>
</tr>
</tbody>
</table>
3. Eliminate annual sign permit renewal fees
   - Eliminating annual sign fees will minimize wasted postage and staff time, and the loss of annual sign fee revenue will be offset by increased revenue from the expanded business registration program. Permit process and sign installation permit fees would remain the same.
   - Approximately 800 annual sign renewal fees generates approximately $25,000 annually.
   - The average annual sign fee is about $12, and is invoiced and mailed separately from the annual business or food establishment license.
   - Issuing these notices and manually processing the payments as they come in takes a great deal of staff time in both community development and the collector’s office.
   - The administration of the invoices and payment collection actually slows the actual enforcement of sign regulations and graffiti removal as it is administered by the same individual.
   - The initial sign permit fee and sign review process and inspection will remain unchanged.

Business licensing in other communities

Business regulation practices and fee schedules vary widely throughout the Chicago area. Like Evanston, most communities with business licensing requirements assess fees based on some combination of square footage or specific type of use, often with similar exemptions for nonprofits and state-licensed occupations. Regulation of home occupations also varies; although many communities don’t require any fees or licensing for home-based businesses, there are several jurisdictions that do have annual registration or licensing requirements, including Schaumburg ($95/year), Palatine ($27/year), Park Ridge ($35/year) and Waukegan ($100/year).

Skokie and Highland Park were of particular interest as neither requires a general business license at the municipal level. The Village of Skokie requires every user of commercial space to obtain an annual occupancy permit, with a $75 annual fee. An additional “business license” is only required for specific uses, including pawn shops, massage establishments, and bowling alleys (among others). Highland Park requires an annual business registration ($35 annual fee), with additional licensing requirements for food establishments and places of public assembly. Because these requirements aren’t “licenses,” these communities are able to include businesses that are licensed by the state.

Background

The Community Development Department currently issues general business licenses, which are required for businesses operating in commercial space in Evanston. As part of the process for licensing new businesses, the zoning team reviews business license applications, and the fire department conducts a Fire, Life, and Safety inspection of the business location before a license is issued. Under the current code, nonprofit entities, home-based businesses, and occupations licensed by the Department of Financial & Professional Regulation (IDFPR) (i.e. medical doctors, lawyers, accountants, cosmetologists, etc.) are exempt from City business licensing. Any business involving retail, storage or manufacturing of food for human
consumption is licensed as a food establishment by the Health Department, which takes the place of a general business license.

General business licenses are renewed annually, with fees determined based on square footage or specific use as summarized in the following table:

<table>
<thead>
<tr>
<th>License Category</th>
<th>Annual Fee</th>
<th># of Active Licenses in 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-3,000 s.f.</td>
<td>$75</td>
<td>318</td>
</tr>
<tr>
<td>3,001-10,000 s.f.</td>
<td>$150</td>
<td>64</td>
</tr>
<tr>
<td>10,000+ s.f.</td>
<td>$250</td>
<td>41</td>
</tr>
<tr>
<td>Auto Repair</td>
<td>$150</td>
<td>44</td>
</tr>
<tr>
<td>Pet shop/kennel</td>
<td>$94</td>
<td>1</td>
</tr>
<tr>
<td>Resale or consignment shop</td>
<td>$94</td>
<td>5</td>
</tr>
<tr>
<td>Drycleaners</td>
<td>$50</td>
<td>21</td>
</tr>
<tr>
<td>Pawn Shops</td>
<td>$125</td>
<td>1</td>
</tr>
<tr>
<td>Movie theaters</td>
<td>$0.95 per seat</td>
<td>1</td>
</tr>
<tr>
<td>Out-of-town or home-based</td>
<td>$40</td>
<td>22</td>
</tr>
<tr>
<td>Landscape contractors</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$53,000</strong></td>
<td><strong>518</strong></td>
</tr>
</tbody>
</table>

In addition to the 518 general business licenses currently active, the Health Department also manages approximately 400 food establishment licenses.

The definition of what constitutes a business requiring a license in the relevant section of the City Code excludes government entities, home occupations, tax exempt organizations, and any businesses or occupations exempt from City licensing pursuant to state or federal law. In practice, this exception has been interpreted to apply to any business or profession licensed by the IDFPR, effectively exempting many users of office and retail space from City licensing, especially professional services firms (medical professionals, attorneys, accountants, engineers, realtors, etc.) and personal services businesses (spas, salons, barber shops, etc.). As a result, when exempt businesses open in Evanston, particularly in office space, it isn’t uncommon for them to have little to no interaction with the City; there’s no zoning review or fire inspection unless the space is being renovated. The proposed changes will also address contradictions regarding home-based businesses.

Personal and professional services businesses are among the fastest-growing sectors in the U.S. economy, particularly when compared with traditional brick-and-mortar retail. Excluding these categories from general business licensing has limited the City’s ability to maintain useful data about the local business community, hampered communication between staff and business owners, and prevented inspections to ensure safe working spaces. Although there are approximately 500 general business licenses active in the City, data provided by the Illinois Department of Revenue suggests that up to 5,000 businesses are currently operating in Evanston, including state-licensed occupations and home-based ventures.

Next Steps

Staff will implement the new business registry in Fall 2019 upon City Council approval of changes to the City Code. Invoices for the first year of registering business will be mailed as staff does not have electronic means of contacting all of the businesses. Staff will include an introductory letter with the new business registry explaining the new process and providing a link to a web-based business registration form.
Payments for 2020 business registration will be due on or before December 31, 2018. Registration and payment will occur online with debit, credit, or electronic check, cash or check payments will be managed by the revenue office. In year two, after a successful first round of collecting business contact information, businesses will be invoiced via email, his will reduce postage and printing costs and reduce staff time.
### Economic Development

<table>
<thead>
<tr>
<th>Project</th>
<th>Address</th>
<th>Ward</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foster School / Family Focus</td>
<td>2010 Dewey</td>
<td>5</td>
<td>Received State of Illinois grant.</td>
</tr>
<tr>
<td>1801 Church/2113 Dewey</td>
<td>1801 Church</td>
<td>5</td>
<td>City Owned Property. Plans TBD. August 5th Ward meeting to discuss</td>
</tr>
<tr>
<td>1829 Simpson Street</td>
<td>1829 Simpson</td>
<td>5</td>
<td>Plans TBD</td>
</tr>
<tr>
<td>Former Fresh Foods</td>
<td>1723 Simpson</td>
<td>5</td>
<td>For lease or sale.</td>
</tr>
<tr>
<td>Double Clutch Brewery</td>
<td>2119 Ashland</td>
<td>5</td>
<td>Space under construction</td>
</tr>
<tr>
<td>Jamaican Restaurant</td>
<td>1905 Church</td>
<td>5</td>
<td>Restaurant to open in former Bozell Imports</td>
</tr>
<tr>
<td>Masonic Temple</td>
<td>Emerson</td>
<td>5</td>
<td>Architect owner renovating building for architects office</td>
</tr>
<tr>
<td>5th Ward Bank</td>
<td>TBD</td>
<td>5</td>
<td>Staff working with banks to identify potential locations for a bank in the 5th ward</td>
</tr>
<tr>
<td>Central Evanston Business Association (CEBA)</td>
<td>N/A</td>
<td>5</td>
<td>2019 Great Merchant Grant application approved. Spring planters were installed. Staff met with 5th Ward merchants on June 10 to address parking and other business district concerns.</td>
</tr>
<tr>
<td>Hill Arts Business Association</td>
<td>N/A</td>
<td>5</td>
<td>2019 Great Merchant Grant application approved. Spring planters were installed. Staff met with 5th Ward merchants on June 10 to address parking and other business district concerns.</td>
</tr>
<tr>
<td>West Evanston Plan</td>
<td>N/A</td>
<td>5</td>
<td>Staff to continue efforts to implement plan</td>
</tr>
<tr>
<td>Gibbs Morrison Cafe Space</td>
<td>1823 Church</td>
<td>5</td>
<td>City Council considering lease with Lifehouse Evanston, LLC, operator of five restaurants in Chicago</td>
</tr>
<tr>
<td>Maple/Foster Merchant</td>
<td>N/A</td>
<td>5</td>
<td>2019 Great Merchant Grant application approved. merchants are working on designing a banner.</td>
</tr>
</tbody>
</table>

### CENTRAL STREET

<table>
<thead>
<tr>
<th>Project</th>
<th>Address</th>
<th>Ward</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Street Business Association</td>
<td>N/A</td>
<td>6,7</td>
<td>Great Merchant Grant 2019 application approved.</td>
</tr>
<tr>
<td>Central Street SSA</td>
<td>Crawford-Gross Point, Central</td>
<td>6</td>
<td>No residential in SSA. Staff coordinating with Teska (consultant) on implementation. The feasibility Study will be ready in September. Fall City Council approval.</td>
</tr>
<tr>
<td>Central Street Planning</td>
<td>1800 Central</td>
<td>7</td>
<td>Staff to review planning study. Talk to CVS, Sarkis, Nic's space about plans</td>
</tr>
<tr>
<td>Happy Husky Bakery - Closed/Closing</td>
<td>2601 Prairie</td>
<td>7</td>
<td>Pet bakery closing in September due to personal reasons.</td>
</tr>
<tr>
<td>Hack Studio - Closed</td>
<td>2510 Green Bay Rd</td>
<td>7</td>
<td>Space available for sale. Plans for event space from current owner canceled</td>
</tr>
<tr>
<td>Vacant former video store / Pita 1</td>
<td>1926 Central</td>
<td>7</td>
<td>Property acquired and will be renovated as a new restaurant 10 Mile House owner.</td>
</tr>
<tr>
<td>1801 Central Street</td>
<td>1801 Central</td>
<td>7</td>
<td>Construction permits were pulled and constrution to start soon.</td>
</tr>
<tr>
<td>Vacant Former 7-Eleven</td>
<td>Ewing &amp; Central</td>
<td>6</td>
<td>Owner seeking tenants</td>
</tr>
<tr>
<td>Central Rug and Carpet</td>
<td>3006 Central</td>
<td>6</td>
<td>Landlord seeking tenants</td>
</tr>
<tr>
<td>Lush Wine &amp; Spirits</td>
<td>2022 Central</td>
<td>7</td>
<td>Opening Soon Lush needs to update liquor license.</td>
</tr>
<tr>
<td>Central Street Metra Station Café</td>
<td></td>
<td>7</td>
<td>Monitoring.</td>
</tr>
<tr>
<td>1731 Central</td>
<td>1731 Central</td>
<td>7</td>
<td>Property for sale and under contract</td>
</tr>
</tbody>
</table>

### DOWNTOWN

<table>
<thead>
<tr>
<th>Project</th>
<th>Address</th>
<th>Ward</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northlight Theater</td>
<td>1012 Church Street</td>
<td>4</td>
<td>Northlight announced location and funding from State of Illinois. Fundraising ongoing. Planned Development Process underway. 4th Ward meeting August</td>
</tr>
<tr>
<td>Mid Kitchen - New Restaurant</td>
<td>1512 Sherman</td>
<td>4</td>
<td>New restaurant opened next to Albion. Former crepepine</td>
</tr>
<tr>
<td>New allergy free kitchen incubator</td>
<td>1009 Davis</td>
<td>4</td>
<td>New allergy free kitchen space openings in former greek restaurant and Chicago hot dog restaurant space</td>
</tr>
<tr>
<td>Project Address</td>
<td>Address</td>
<td>Ward</td>
<td>Latest Update</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------</td>
<td>------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>City Grange</td>
<td>128-130</td>
<td>8</td>
<td>Due diligence ongoing for redevelopment of former parking lot and auto repair shop into mixed use residential development with garden center retail / education space.</td>
</tr>
<tr>
<td>Sweet Temptations Bakery</td>
<td>607 Howard</td>
<td>8</td>
<td>Considering expansion options.</td>
</tr>
<tr>
<td>Mobil</td>
<td>140 Chicago Ave</td>
<td>8</td>
<td>Owners upgrading gas station</td>
</tr>
<tr>
<td>Gaynor Monument</td>
<td>222 Chicago Ave</td>
<td>8</td>
<td>Building demolished. Owner to determine potential reuse</td>
</tr>
<tr>
<td>820 Davis Property</td>
<td>820 Davis</td>
<td>4</td>
<td>New Owner planning significant renovation</td>
</tr>
<tr>
<td>1555 Ridge</td>
<td>1555 Ridge</td>
<td>4</td>
<td>Private parking lot at Grove and Ridge listed for sale. Residential developers interested</td>
</tr>
<tr>
<td>The Link</td>
<td>811 Emerson</td>
<td>1</td>
<td>Lower level through 4th floor finished end of August, 5-9 in September, 7th floor - 11th middle of August</td>
</tr>
<tr>
<td>1743 Sherman Ave (Taco Bell)</td>
<td>1743 Sherman</td>
<td>1</td>
<td>Slated for new restaurant Bare Naked Bowls, architect working on interior changes</td>
</tr>
<tr>
<td>Newport Coffee (former Cheesies Pub)</td>
<td>622 Davis</td>
<td>4</td>
<td>Now open</td>
</tr>
<tr>
<td>William's Shoes</td>
<td>710 Church</td>
<td>4</td>
<td>William's Shoes closing. Final sale. Business for sale</td>
</tr>
<tr>
<td>Market Fresh Books</td>
<td>700 Church Street</td>
<td>4</td>
<td>Staff will monitor competition from other bookstores/amazon</td>
</tr>
<tr>
<td>Former Studio Media (Kelch space)</td>
<td>1028 Davis</td>
<td>4</td>
<td>PHIILZ coffee leased 2,000 sq ft, chiropractor to lease remaining space at rear</td>
</tr>
<tr>
<td>Avidor “Active Adult” Residential</td>
<td>1007 Church</td>
<td>2</td>
<td>Construction ongoing. June 2020 delivery</td>
</tr>
<tr>
<td>1611 Chicago Avenue</td>
<td>1611 Chicago</td>
<td>1</td>
<td>3,200 sq ft new retail space remains available for lease</td>
</tr>
<tr>
<td>Burger King (Downtown)</td>
<td>1740 Orrington</td>
<td>1</td>
<td>Interested developers have contacted property owner.</td>
</tr>
<tr>
<td>Sherman Plaza Retail</td>
<td>1620 Sherman</td>
<td>1</td>
<td>Eggexperience signed lease for former 800 Degrees Pizza restaurant space</td>
</tr>
<tr>
<td>Vacant Davis Irish Market Space</td>
<td>501 Davis</td>
<td>1</td>
<td>Owner divided into several smaller storefronts for lease</td>
</tr>
<tr>
<td>717 Church</td>
<td>717 Church</td>
<td>1</td>
<td>2nd floor above Andy's/Sprint Store/Chipotle remains available for lease</td>
</tr>
<tr>
<td>The Merion Retail</td>
<td>1611 Chicago</td>
<td>1</td>
<td>Joy Yee is to relocate to the corner space at Chicago/Davis.</td>
</tr>
<tr>
<td>Church Street Plaza</td>
<td>1705 Maple</td>
<td>1</td>
<td>New Salon Lofts concept opening in former Buffalo Wild Wings location.</td>
</tr>
<tr>
<td>National Towel Building Site</td>
<td>815 Ridge</td>
<td>2</td>
<td>Senior housing project construction planned. Finalizing submission for building permit</td>
</tr>
<tr>
<td>Albion Residential</td>
<td>1454-1508 Sherman</td>
<td>1</td>
<td>Floors 1-4 to be delivered in November with remaining floors phased through January. Retail tenant space will be ready after August.</td>
</tr>
<tr>
<td>1571 Maple</td>
<td>1571 Maple</td>
<td>1</td>
<td>1,500 sq ft remains available</td>
</tr>
<tr>
<td>605 Davis &amp; Chase Bank Drive Thru</td>
<td>605 Davis</td>
<td>4</td>
<td>Planned development submitted. Under review. Community meeting 4th Ward August</td>
</tr>
<tr>
<td>1020 Church</td>
<td>1020 Church</td>
<td>4</td>
<td>Building for Sale.</td>
</tr>
<tr>
<td>Sojourner Church</td>
<td>1708 Oak</td>
<td>2</td>
<td>New owner considering development options</td>
</tr>
<tr>
<td>Las Palmas</td>
<td>817 University</td>
<td>1</td>
<td>Building owner considering options</td>
</tr>
<tr>
<td>Copycat</td>
<td>1830 Sherman</td>
<td>1</td>
<td>Property owner seeking tenants for garden level</td>
</tr>
<tr>
<td>King Homes</td>
<td>1555 Oak</td>
<td>4</td>
<td>Cameel Halim purchased property. Plans TBD.</td>
</tr>
<tr>
<td>Whole Foods Downtown</td>
<td>1640 Chicago Ave</td>
<td>4</td>
<td>Staff will monitor in light of Amazon purchase of Whole Foods</td>
</tr>
<tr>
<td>E2 Retail</td>
<td>1890 Maple</td>
<td>2</td>
<td>Space on maple available</td>
</tr>
<tr>
<td>Lumen Optical - Closed</td>
<td>809 Church</td>
<td>1</td>
<td>Owner seeking new tenant for vacant space</td>
</tr>
<tr>
<td>Falcon Eddy's - Closed</td>
<td>825 Church</td>
<td>1</td>
<td>Owner seeking new tenant for vacant space</td>
</tr>
<tr>
<td>Tealicious Bubble</td>
<td>1565 Sherman</td>
<td>4</td>
<td>Leased Sushi Burrito location</td>
</tr>
</tbody>
</table>

**HOWARD STREET**

<table>
<thead>
<tr>
<th>Project</th>
<th>Address</th>
<th>Ward</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>City Grange</td>
<td>128-130 Chicago Ave</td>
<td>8</td>
<td>Due diligence ongoing for redevelopment of former parking lot and auto repair shop into mixed use residential development with garden center retail / education space.</td>
</tr>
<tr>
<td>Sweet Temptations Bakery</td>
<td>607 Howard</td>
<td>8</td>
<td>Considering expansion options.</td>
</tr>
<tr>
<td>Mobil</td>
<td>140 Chicago Ave</td>
<td>8</td>
<td>Owners upgrading gas station</td>
</tr>
<tr>
<td>Gaynor Monument</td>
<td>222 Chicago Ave</td>
<td>8</td>
<td>Building demolished. Owner to determine potential reuse</td>
</tr>
</tbody>
</table>
CJE Senior Life Expansion | 999 Howard | 8 | CJE Senior Life plans an affordable senior housing development. Howard Ridge TIF expansion study underway.
729 Howard Street | 727-729 Howard | 8 | Lot to be renovated and completed in July. Payboxes will be available.
533 Howard | 633 Howard | 8 | Café Coralie vacated the space. Staff is working to identify potential tenants.
Palmhouse (Event space) | 611-21 Howard | 8 | Special use granted on May 13, 2019. vacant former sherwyn williams
Vape847 | 327 Howard | 8 | Pending Fire, Life and Safety Inspection
Caribbean Shipping - 705 Howard | 705 Howard | 8 | 2019 Great Merchant Grant application approved. Planning an open house in September.
Howard Street Business Association | N/A | 8 | Montelimar Bread Co. is going through the Food License application to open in Evanston.
Montelimar Bread Co. | 1731 Howard | 8 | A church applied for a special use permit, which was held in DAPR. Applicant needs to provide more information.

### MAIN DEMPSTER MILE

<table>
<thead>
<tr>
<th>Project</th>
<th>Address</th>
<th>Ward</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lot 1 Redevelopment</td>
<td>South &amp; Hinman</td>
<td>3</td>
<td>Public meeting planned to consider development options</td>
</tr>
<tr>
<td>Main/Chicago</td>
<td>847 Chicago</td>
<td>3</td>
<td>Stone Realty retail broker actively pursuing tenants for remaining retail space</td>
</tr>
<tr>
<td>Former ORT Space</td>
<td>915 Chicago</td>
<td>3</td>
<td>Ten Thousand Villages now open</td>
</tr>
<tr>
<td>Main Street Metra Station</td>
<td>600 Main</td>
<td>3</td>
<td>Union Pacific hiring broker to market vacant space.</td>
</tr>
<tr>
<td>Vacant Paramour Bungalow Space</td>
<td>812 Dempster</td>
<td>3</td>
<td>Seeking tenants. Space 900 taking over half of the remaining space.</td>
</tr>
<tr>
<td>710 Main Street</td>
<td>710 Main</td>
<td>4</td>
<td>Reprise Coffee continues construction on space</td>
</tr>
<tr>
<td>Hewn</td>
<td>810 Dempster</td>
<td>4</td>
<td>Coordinate with Hewn for potential production expansion.</td>
</tr>
<tr>
<td>Dard Property</td>
<td>912 Custer</td>
<td>4</td>
<td>City Council P&amp;D approved plans for 40 townhouses. Vacant DARD building to be demolished.</td>
</tr>
<tr>
<td>Autobarn</td>
<td>1034 Chicago</td>
<td>3</td>
<td>Public Meeting to present opportunity/seek community input</td>
</tr>
<tr>
<td>Connoisseur Rugs property</td>
<td>1000 Chicago</td>
<td>3</td>
<td>Public Meeting to present opportunity/seek community input</td>
</tr>
<tr>
<td>Main Street Streetscape</td>
<td>Main Street, Hinman to Maple</td>
<td>3 &amp; 4</td>
<td>Construction expected in 2020. Coordination meeting with merchants occurred 4/17/2019. Public Meeting held 5.16.19</td>
</tr>
<tr>
<td>Sketchbook</td>
<td>821 Chicago</td>
<td>3</td>
<td>Construction underway to expand into space formerly occupied by Evanston Family Dental.</td>
</tr>
</tbody>
</table>

### WEST END / WEST VILLAGE

<table>
<thead>
<tr>
<th>Project</th>
<th>Address</th>
<th>Ward</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>West End Business Association</td>
<td>N/A</td>
<td>2</td>
<td>2019 Great Merchant Grant application approved. Spring planters to be installed by the end of March. The group is planning manufacturing day tour for high school students and their annual block party.</td>
</tr>
<tr>
<td>West Village Business Association</td>
<td>N/A</td>
<td>2</td>
<td>2019 Great Merchant Grant application approved.</td>
</tr>
<tr>
<td>EZ Spuds</td>
<td>2223 Washington</td>
<td>2</td>
<td>EZ Spuds relocated to Melrose Park. Space will be available soon</td>
</tr>
<tr>
<td>Art District</td>
<td>Florence/Greenleaf</td>
<td>2</td>
<td>Working with artists in neighborhood on art district planning concept</td>
</tr>
<tr>
<td>1108 Dodge (Former Evanston Auto Glass)</td>
<td>1108 Dodge</td>
<td>2</td>
<td>For lease or sale</td>
</tr>
<tr>
<td>Reed Biedler Building</td>
<td>1275 Hartrey</td>
<td>2</td>
<td>Pursuing tenants for limited vacancies</td>
</tr>
<tr>
<td>2222 Oakton Street</td>
<td>2222 Oakton</td>
<td>8</td>
<td>City Council introduced Approval to negotiate sale to Clark Street Real Estate to renovate as First Ascent Climbing Gym. Staff negotiating</td>
</tr>
<tr>
<td>Oakton Car Wash</td>
<td>2425 Oakton</td>
<td>9</td>
<td>Plan Commission Recommended for approval</td>
</tr>
<tr>
<td>Location</td>
<td>Address</td>
<td>Type</td>
<td>Notes</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------</td>
<td>---------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Evanston Plaza</td>
<td>1924-26 Dempster</td>
<td>2</td>
<td>AutoZone now open. Kids Empire (kids activity center) and Blink Fitness leased signs, spaces under construction</td>
</tr>
<tr>
<td>1335 Dodge Ave. (CNE)</td>
<td>1335 Dodge</td>
<td>2</td>
<td>Commercial property for sale</td>
</tr>
<tr>
<td>1917 Greenleaf</td>
<td>1917 Greenleaf</td>
<td>2</td>
<td>For sale</td>
</tr>
<tr>
<td>Tenant</td>
<td>Address</td>
<td>Date of Lease Agreement</td>
<td>Term of Lease</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------</td>
<td>-------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>PharmaCann LLC</td>
<td>1804 Maple Ave</td>
<td>5/1/15 option ext. 9/20/18</td>
<td>36 months</td>
</tr>
<tr>
<td>Chicago Main Newstand</td>
<td>860 Chicago Ave</td>
<td>1/1/16</td>
<td>60 months</td>
</tr>
<tr>
<td>Enterprise Car Rental</td>
<td>1810 Maple Ave</td>
<td>10/1/16</td>
<td>60 months</td>
</tr>
<tr>
<td>Theo Ubique</td>
<td>721 Howard St.</td>
<td>4/12/17</td>
<td>120 months</td>
</tr>
<tr>
<td>Cafe Coralie</td>
<td>633 Howard St.</td>
<td>10/1/2017</td>
<td>120 months</td>
</tr>
<tr>
<td>Hip Circle</td>
<td>727 Howard St.</td>
<td>5/15/18</td>
<td>60 months</td>
</tr>
</tbody>
</table>

[1] including late fees and interest as applicable
## City of Evanston Economic Development Loans

<table>
<thead>
<tr>
<th>Loan Status</th>
<th>Borrower</th>
<th>Address</th>
<th>Loan Origination Date</th>
<th>Original Loan Amount</th>
<th>Monthly Payment</th>
<th>Total Amount Paid</th>
<th>Loan Balance</th>
<th>Date Loan Terminates</th>
<th>Status</th>
<th>Default Total [1]</th>
<th>Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVE</td>
<td>Ward Eight</td>
<td>629 Howard St</td>
<td>3.15.12</td>
<td>$130,000.00</td>
<td>$1,316.19</td>
<td>$76,599.81</td>
<td>$24,173.01</td>
<td>$102,712.92</td>
<td>$51,460.19</td>
<td>12.1.22</td>
<td>TIF</td>
</tr>
<tr>
<td>ACTIVE</td>
<td>Evanston North Shore Contractors Cooperative</td>
<td>1817 Church</td>
<td>8.14.12</td>
<td>$200,000.00</td>
<td>$1,028.26</td>
<td>$23,103.57</td>
<td>$31,394.21</td>
<td>$54,497.78</td>
<td>$176,896.43</td>
<td>1.5.20</td>
<td>TIF</td>
</tr>
<tr>
<td>ACTIVE</td>
<td>Hip Circle Empowerment Center</td>
<td>727 Howard St</td>
<td>6.1.18</td>
<td>$24,689.50</td>
<td>$447.23</td>
<td>$5,078.92</td>
<td>$735.07</td>
<td>$5,613.99</td>
<td>$19,810.58</td>
<td>6.1.23</td>
<td>TIF</td>
</tr>
<tr>
<td>ACTIVE</td>
<td>Little Beans</td>
<td>430 Asbury Ave</td>
<td>2.1.14</td>
<td>$75,000.00</td>
<td>$632.65</td>
<td>$23,513.30</td>
<td>$14,768.60</td>
<td>$36,301.90</td>
<td>$51,486.70</td>
<td>1.3.1.25</td>
<td>ED</td>
</tr>
<tr>
<td>ACTIVE</td>
<td>Cafe Coralle</td>
<td>638 Howard St</td>
<td>10.1.17</td>
<td>$50,000.00</td>
<td>$526.86</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$50,000.00</td>
<td>9.1.27</td>
<td>$4,630.80</td>
<td>TIF, ED, CDBG</td>
</tr>
<tr>
<td>ACTIVE</td>
<td>Good To Go</td>
<td>711 Howard St</td>
<td>4.1.18</td>
<td>$25,000.00</td>
<td>$258.74</td>
<td>$434.87</td>
<td>$85.13</td>
<td>$520.00</td>
<td>$24,565.13</td>
<td>3.1.28</td>
<td>ED</td>
</tr>
</tbody>
</table>

### CLOSED LOANS

- Ward Eight 629 Howard St 3.15.12 $362,650.00
- Chicken & Whiff 2424 Dempster 10.1.12 $202,937.63
- Nomad Dreams 1818 Dempster 10.22.12 $100,000.00
- Peckish Pig (Bal) 623 Howard St 3.18.13 $675,000.00
- Curt’s Café 2322 Central St 5.11.14 $15,000.00
- FEW Spirits 918 Chicago Ave 6.27.14 $250,000.00
- Davis Transport 1040 Wesley Ave 11.1.15 $144,519.00
- Corrado Cutlet 716 Main St 1.25.12 $31,500.00

[1] including late fees

Last Update: 06/20/2019
MONTHLY RETT REPORT FOR APRIL 2019

TO: City Council
FROM: Leticia A. Blackman
SUBJECT: RETT REPORT – APRIL 2019

BUDGET 2019 $4,150,000.00

<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>147,018</td>
<td>69</td>
<td>JANUARY</td>
<td>123,715</td>
<td>45</td>
<td>123,715</td>
</tr>
<tr>
<td>FEBRUARY</td>
<td>166,865</td>
<td>53</td>
<td>FEBRUARY</td>
<td>112,610</td>
<td>54</td>
<td>236,325</td>
</tr>
<tr>
<td>MARCH</td>
<td>181,500</td>
<td>80</td>
<td>MARCH</td>
<td>290,943</td>
<td>89</td>
<td>527,268</td>
</tr>
<tr>
<td>APRIL</td>
<td>272,735</td>
<td>101</td>
<td>APRIL</td>
<td>249,940</td>
<td>118</td>
<td>776,708</td>
</tr>
<tr>
<td>MAY</td>
<td>366,950</td>
<td>138</td>
<td>MAY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JUNE</td>
<td>788,452</td>
<td>166</td>
<td>JUNE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JULY</td>
<td>355,020</td>
<td>118</td>
<td>JULY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AUGUST</td>
<td>401,215</td>
<td>159</td>
<td>AUGUST</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SEPTEMBER</td>
<td>252,080</td>
<td>85</td>
<td>SEPTEMBER</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OCTOBER</td>
<td>381,675</td>
<td>83</td>
<td>OCTOBER</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NOVEMBER</td>
<td>209,085</td>
<td>67</td>
<td>NOVEMBER</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DECEMBER</td>
<td>309,041</td>
<td>79</td>
<td>DECEMBER</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

APRIL 2019 Revenues were reduced to reflect this expenditure: $0

Monthly average needed to meet budget $345,833.00

FY 2019 Monthly Average: $194,302.00

31 EXEMPTIONS @ $100.00 each: $3,100.00; CUMULATIVE: $18,500.00

$ MILLION (6) SALES IN APRIL 2019

1) 04/04/2019 – 1021 Forest Ave, $1,550,000.00, Tax: $10,850.00; Seller: Stoklosa; Buyer: Naidech
2) 04/08/2019 – 1950 Greenbay Rd, $1,425,000.00, Tax: $7,125.00; Seller: Fire King Oil Company; Buyer: Investment Alliance, LLC
3) 04/09/2019 – 2437 Sheridan Rd, $1,300,000.00, Tax: $6,500.00; Seller: General Sheridan, LLC; Buyer: DiBartolo
4) 04/25/2019 – 2206 Lincolnwood Dr, $1,280,000.00, Tax: $6,400.00; Seller: SWWYK, LLC; Buyer: Caldicott Trust
MONTHLY RETT REPORT FOR APRIL  2019

5) 04/29/2019 – 2619 Lincolnwood Dr - $1,040,000.00, Tax: $5,200.00; Seller: Naidech; Buyer: Driscoll
6) 04/29/2019 – 1519 Hinman Ave, $1,095,000.00, Tax: $5,475.00; Seller: Bottorff; Buyer: Elliott

COMMERCIAL (2) SALES IN APRIL 2019

1) 04/08/2019 – 1950 Greenbay Rd, $1,425,000.00, Tax: $7,125.00; Seller: Fire King Oil Company; Buyer: Investment Alliance, LLC
2) 04/22/2019 – 1031 Sherman Ave, $950,000.00, Tax: $4750.00; Seller: Dalton; Buyer: 1031 Sherman Ave, LLC c/o Robert Fisher
MONTHLY RETT REPORT FOR MAY 2019

TO: City Council  
FROM: Leticia A. Blackman  
SUBJECT: RETT REPORT – MAY 2019  

BUDGET 2019  $4,150,000.00

<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>147,018</td>
<td>69</td>
<td>JANUARY</td>
<td>123,715</td>
<td>45</td>
<td>123,715</td>
</tr>
<tr>
<td>FEBRUARY</td>
<td>166,865</td>
<td>53</td>
<td>FEBRUARY</td>
<td>112,610</td>
<td>54</td>
<td>236,325</td>
</tr>
<tr>
<td>MARCH</td>
<td>181,500</td>
<td>80</td>
<td>MARCH</td>
<td>290,943</td>
<td>89</td>
<td>527,268</td>
</tr>
<tr>
<td>APRIL</td>
<td>272,735</td>
<td>101</td>
<td>APRIL</td>
<td>249,940</td>
<td>118</td>
<td>776,708</td>
</tr>
<tr>
<td>MAY</td>
<td>366,950</td>
<td>138</td>
<td>MAY</td>
<td>288,205</td>
<td>133</td>
<td>1,064,913</td>
</tr>
<tr>
<td>JUNE</td>
<td>788,452</td>
<td>166</td>
<td>JUNE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JULY</td>
<td>355,020</td>
<td>118</td>
<td>JULY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AUGUST</td>
<td>401,215</td>
<td>159</td>
<td>AUGUST</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SEPTEMBER</td>
<td>252,080</td>
<td>85</td>
<td>SEPTEMBER</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OCTOBER</td>
<td>381,675</td>
<td>83</td>
<td>OCTOBER</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NOVEMBER</td>
<td>209,085</td>
<td>67</td>
<td>NOVEMBER</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DECEMBER</td>
<td>309,041</td>
<td>79</td>
<td>DECEMBER</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

MAY 2019 Revenues were reduced to reflect this expenditure: $0  
Monthly average needed to meet budget $345,833.00  
FY 2019 Monthly Average: $212,983.00  
60 EXEMPTIONS @ $100.00 each: $6,000.00; CUMULATIVE: $24,500.00  

$ MILLION (7) SALES IN MAY 2019  
1) 05/14/2019 – 1901 Dempster St, $1,750,000.00, Tax: $12,250.00; Seller: Zhang; Buyer: DSJB XI, LLC  
2) 05/17/2019 – 2433 Marcy Ave, $1,030,000.00, Tax: $5005.00; Seller: Scott; Buyer: Welling  
3) 05/22/2019 – 1320 Jenks, $1,270,000.00, Tax: $6350.00; Seller: OP Holdings 1, LLC; Buyer: Baxter  
4) 05/29/2019 – 2600-2610 Bennett Ave, $3,170,000.00, Tax: $22,190.00; Seller: Bennett-Central Building Corp; Buyer: Round Square Equity, LLC  
5) 05/29/2019 – 817 Hinman Ave #5E, $1,125,000.00, Tax: $5,625.00; Seller: Rodin; Buyer: Horwatt  
6) 05/30/2019 – 200 Burnham Pl, $1,800,000.00, Tax: $12,600.00; Seller: Chernoff; Buyer: Katsanis
7) 05/31/2019 – 429 Greenwood St, $1,200,000.00, Tax: $6,000.00; Seller: Coldwell; Buyer: Miller

COMMERCIAL (3) SALES IN MAY 2019

1. 05/01/2019 – 2044 Wesley Ave, $415,000.00, Tax: $2075.00; Seller: Chicago Title Land Trust; Buyer: Temp Capital, Inc.
2. 05/02/2019 – 1811 Benson Ave, $203,000.00, Tax: $1015.00; Seller: LM Evanston Properties. LLC; Buyer: Mayo
3. 05/14/2019 – 1901 Dempster St, $1,750,000.00, Tax: $12,250.00; Seller: Zhang; Buyer: DSJB XI, LLC