



## Lee-Ogle Enterprise Zone Agenda

Location: Rochelle City Hall

Date: 4/27/2018 at 10 am

10:00 a.m.	<b>I. Call to Order and Attendance</b>	Chair
10:05 a.m.	<b>II. Minutes</b>	Chair
10:10 a.m.	<b>I. Unfinished Business</b>	
	a. Financial & Admin Report	Andy Shaw, Administrator
	b. Blackhawk Hills Administrative Proposal	AS
	c. City of Oregon & Municipal Expansion	AS
	d. Other Unfinished Business	Board
10:40 a.m.	<b>III. New Business</b>	
	a. Amboy & Mount Morris Applications	AS
	b. 2018 Projects Application	AS
	c. New MOU (& Clawback Discussion)	AS
	d. Opportunity Zone	AS
11:00 a.m.	<b>IV. Next Board Meeting &amp; Location</b>	Board
11:05 a.m.	<b>V. Roundtable Discussion</b>	Chair
11:15 a.m.	<b>VI. Adjournment</b>	Chair



- Draft
- Final
- Amended

## Lee-Ogle Enterprise Zone Meeting Minutes

Location: Dixon City Hall Council Chambers

Date: 3/1/18

### Voting Membership Attendance

In-Person	Remote	
<input type="checkbox"/>	<input type="checkbox"/>	City of Dixon Mayor Liandro Arellano (Vice Chair)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	City of Rochelle Mayor Chet Olson (Chair)
<input type="checkbox"/>	<input type="checkbox"/>	Lee County Chairman Jim Wentling
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ogle County Chairman Kim Gouker
<input checked="" type="checkbox"/>	<input type="checkbox"/>	GREDCO President Jason Anderson
<input checked="" type="checkbox"/>	<input type="checkbox"/>	LCIDA Exec. Director Kevin Marx
<input type="checkbox"/>	<input type="checkbox"/>	Administrator Andy Shaw
<input type="checkbox"/>	<input type="checkbox"/>	

### Guests in Attendance

In-Person	Remote	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Greg Sparrow, Ogle County Board
<input checked="" type="checkbox"/>	<input type="checkbox"/>	John Finrock, Ogle County Board
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Dan Payette, Blackhawk Hills RC
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Theresa Wittenauer, Lee County Admin
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ken Williams, Mayor, City of Oregon
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Danny Langloss, Dixon City Manager
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jeff Fiegenschuh, Rochelle City Manager
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Don Griffin, Ogle County Board
<input type="checkbox"/>	<input type="checkbox"/>	Julie Jacobs, Blackhawk Hills RC
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	

### Call to Order

Chair Olson called the meeting to order at 10:02 a.m. Payette announced that Shaw would not be able to attend today’s meeting due to being ill.

### Minutes

The minutes to the January 23, 2018 minutes were handed out. Dan Payette asked that everyone check the minutes over for accuracy. Gouker made a motion to approve the minutes as written. Anderson noted that board membership cannot be added except by an ordinance modification. Payette will check with Shaw on it. Langloss seconded the motion. Motion carried.

### Financial Report

The financial report was included in the meeting folders. There was only one transaction, interest. Anderson made a motion to approve the financial report. Gouker seconded the motion. Motion carried.

### Administrator Report

Payette presented the Administrator’s report on behalf of Shaw. Four public hearings have been held and several abatements have been passed this month. Shaw will be fielding a lot of calls soon after sending letters to many Lee County abatement projects from the old zone. Lee County Assessor and Clerk are aware of this and know to refer people to Shaw. Looking for candidates for the Export Award. Shaw will be attending the Illinois Enterprise Zone Association conference in early May. Board members can join Shaw at the conference at a low cost. Let Shaw know if you are interested in attending.

### New Business

Opportunity Zone application was submitted. Provision in new tax law that the Governor can select areas. Shaw put maps together on census tracts. Individual application and regional application were submitted which included one page on each tract. Similar to new market tax credit. Thanks to everyone that submitted applications.



### **Amboy and Mt. Morris**

Amboy is pretty close to being approved by the State. Shaw heard from Craig Coil that the State is moving slowly. Mt. Morris is almost ready to submit just need a couple of resolutions from Township and Fire District. Need Mayors Olsen and Arellano signature on it.

### **New Projects Application**

This application is moving quickly through the ordinance process, will probably be a month behind the Mt. Morris application. Anderson stated that they are working on a couple of projects that should come around in summertime. Payette asked if anyone knew of businesses that would be benefit, please let our office know if it wasn't included. Anderson asked if Shaw had heard from Love's truck stop. Payette will check with Shaw.

### **BHRC Administrative Proposal**

Payette handed out a copy of the proposed administrative proposal. Not too many changes from last year's document. The agreement is for twenty-four months. Billing will be in March. The contractual/marketing budget line item is considered non-fixed. The board will retain the option to transfer the unspent portion of the expense to the project fund at the end of the calendar year. The board needs to think about what they are going to spend their project funds on. Payette recommended a smaller committee be formed to come up with some ideas. Since this is the first time the board is seeing the proposal, Payette recommended that the agreement be voted on at the next meeting.

### **State Freight Funds**

Payette spoke of the Illinois Competitive Freight Program funding. Application are due on April 6, 2018. Looking for projects that would score best in the four goal categories in the freight transportation plan; bottleneck reduction, freight related safety, intermodal accessibility, and technology deployment. The State is looking at critical corridors which includes I-39. Ten percent of the funds are to be awarded to intermodal projects designed to improve the flow of freight into and out of a freight intermodal or freight rail facility. There is not a lot of time and limited funds. Rochelle would be highly competitive. There is a map on IDOT website showing critical corridors. There was discussion on potential projects in the Rochelle area. If you have a project reach out to the contact person on the application. This would be an opportunity that the zone may want to match. Anderson added that the project needs to be shoveled ready. A potential project could be Dement Road expansion in Rochelle. There is a lot of environmental issues and may not score very well but would have a greater impact.

### **City of Oregon Request to Join the Lee-Ogle EZ**

Mayor Williams presented the City of Oregon's request for the inclusion of 89 acres into the Lee-Ogle EZ. A copy of the request was handed out. The request included the qualifying factors and potential projects within the City, infrastructure, intermodal capabilities, and participation by other governmental bodies. Potential projects for the area include an expansion of a metal fabrication company, riverfront development, and retirement and urgent care facility. The 89 acres are included in the TIF boundaries. Mayor asked if tax abatements are needed if area is same as TIF district. Payette will check with Shaw on the question. There is adequate infrastructure in the proposed area. There was discussion as to how many more acres are allowed in the Lee-Ogle EZ. Anderson felt we should get done the current application before submitting another one. Gouker asked if there were any other communities in Ogle County to include in the zone. Payette will check Shaw on acres available in the zone. Resolutions



approving participation in the EZ have been signed by City of Oregon, Oregon Community Unit School District #220, and Oregon Park District. Copies of the resolutions were given to BHRC staff. No action was taken on the Oregon's request.

#### **Adding Members**

Anderson spoke to Craig Coil on the process of adding new members to the Zone board. The board is an advisory board only. Each county and community would have to agree on adding new members and a change in the ordinance would have to be made. This item will be kept on future agendas.

#### **Next Advisory Board Meeting & Location**

Set for Friday, April 27, 2018 at 10 AM at Rochelle City Hall.

#### **Roundtable Discussion**

Payette announced that BHRC is in the process of updating its five-year Comprehensive Economic Development Strategy (CEDS) Plan. A CEDS Forum will be held in Lee County in April. BHRC is also doing a water study on the availability of water in our area. Informational meetings will be held in April as well. It is important that we get local participation in the CEDS process and the water study.

#### **Adjournment**

Motion to adjourn by Anderson, Gouker seconded. Meeting adjourned at 11:20 AM.



- Draft
- Final
- Amended

## Lee-Ogle Enterprise Zone Meeting Minutes

Location: Rochelle City Hall Conference Room

Date: 4/27/18

### Voting Membership Attendance

In-Person	Remote	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	City of Dixon Mayor Liandro Arellano (Vice Chair)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	City of Rochelle Mayor Chet Olson (Chair)
<input type="checkbox"/>	<input type="checkbox"/>	City of Amboy Mayor John Schamberger
<input type="checkbox"/>	<input type="checkbox"/>	Lee County Chairman Jim Wentling
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ogle County Chairman Kim Gouker
<input checked="" type="checkbox"/>	<input type="checkbox"/>	GREDCO President Jason Anderson
<input type="checkbox"/>	<input type="checkbox"/>	LCIDA Exec. Director Kevin Marx
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Administrator Andy Shaw
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	

### Guests in Attendance

In-Person	Remote	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Greg Sparrow, Ogle County Board
<input checked="" type="checkbox"/>	<input type="checkbox"/>	John Finrock, Ogle County Board
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Dan Payette, Blackhawk Hills RC
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Theresa Wittenauer, Lee County Admin
<input type="checkbox"/>	<input type="checkbox"/>	Ken Williams, Mayor, City of Oregon
<input type="checkbox"/>	<input type="checkbox"/>	Danny Langloss, Dixon City Manager
<input type="checkbox"/>	<input type="checkbox"/>	Jeff Fiegenschuh, Rochelle City Manager
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Don Griffin, Ogle County Board
<input type="checkbox"/>	<input type="checkbox"/>	Julie Jacobs, Blackhawk Hills RC
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Paula Diehl, Mt Morris Clerk
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Farrahn Hawkins, Oregon Peace Corps Fellow

### Call to Order

Chair Olson called the meeting to order at 10:02 a.m

### Minutes

The minutes were emailed and handed out. Motion by Gouker to accept, Shaw 2<sup>nd</sup>. Passed.

### Financial Report

The financial report was included in the meeting folders. Anderson asked when BHRC would withdraw from fund. Shaw said that BHRC is paid for services directly by designating units of government and the project fund is funded by project fees and would only be used for special projects. New project in rural Amboy area at the Growmark fuel terminal.

### Administrator Report

The AFC schools passed a resolution to abate taxes, still need Amboy schools to participate. Jason wanted clarification that the zone was not promising more abatement than is available. Andy stated that Rochelle area has 100% coverage, but he does not state that for the Lee County side, which in Dixon now has Schools, City, County, Parks, Sauk, and Townships, its very close to full abatement. Parts in Amboy or Rock Falls school districts do not have the school tax abated. The Invenergy lawsuit with the schools holds back getting these for now, which affects the former Stanley National building. The Mount Morris application is in the mail, no response yet. Waiting on Dept of Ag review for the Rochelle/Dixon project area application. With Lee County, old zone abatements, virtually all of them changed in some way due to participating tax district changes. The worst are cities not in new zone, Ashton and Franklin Grove. Dixon least impact as we had all but Fire District and Townships. Due to delay of Amboy application we lost a year there. Arellano asked it that year could be picked up and the end and if this board could decide that. Shaw stated it is a county decision. On some matters they have postponed the 1<sup>st</sup> year and start one year later, but likely not in the middle of the abatement period.



On the Opportunity Zone, information from Anderson that it is in US Treasury's hands now, he suggests we send letter of support for the contiguous zones, as we had several important ones in our area that can only get designated in that way. We should know more by next meeting.

This is time of year for reporting of incentives received by companies. At end of period, Dept of Revenue sends me a list to follow-up. If you hear about any problems with it, refer them to me for help.

## **New Business**

### **BHRC Administrative Proposal**

As carried over from last time, Gouker made motion and Arellano made 2<sup>nd</sup>, no discussion, voice vote approved. This is a 2 year proposal and BHRC will bill the designating units of government. BHRC will collect Amboy's contribution from the project fund where it was deposited (the \$670 it paid last year).

### **City of Oregon Request to Join the Lee-Ogle EZ**

Shaws' report on questions coming up under the Oregon discussion was given. In regard to abatement, since all areas to be added are in TIF, no need for resolutions. On area available to each county, zone is still roughly 50/50 between counties, with no explicit restriction on that breakdown. Questions about if not able to use all benefits, like abatement in TIF, is that the best use of the zone? The sales tax is still a very good benefit and with city participation with TIF incentive agreements, the package can be just as valuable. Question on ease of application for a project, and it's found to be easier if combined with a new municipality coming in.

Shaw presented a more rigorous list of criteria, adapted from the Jason Anderson list from last year, for adding a municipality. The main refinement is the need for a letter of commitment from a large-scale zone user or ready to build project site. In support of the criteria, motion made by Arellano, 2<sup>nd</sup> by Gouker, and approved by voice vote.

In regard to TIF, Anderson and Gouker would like to see marketing materials updated to indicate that when TIF trumps EZ, abatement is not available.

### **Clawback Discussion and MOU**

Shaw investigated how "clawback" might work in our EZ. While not technically a clawback, according to our resolutions, firms that do not maintain 75% of jobs created or retained by a project can have remaining abatement years withheld, at the discretion of the board. He does not find that any such MOU was in place in the old zone, but has now placed a similar commitment at the end of the project application.

### **Next Advisory Board Meeting & Location**

Set for Thursday 6/14/2018 at 10 AM at Dixon City Hall.

### **Adjournment**

Motion to adjourn by Arellano, Anderson seconded. Meeting adjourned at 11:30 AM.

**Lee-Ogle Enterprise Zone  
Sauk Valley Bank Checking Account**

<b>Date</b>	<b>Check Number</b>	<b>From</b>	<b>Deposit</b>	<b>Withdrawa</b>	<b>Total</b>
5/25/2017	237254	Willett, Hofmann & Associates, Inc.	\$ 266.00		\$ 266.00
8/3/2017	2888	Centerstage Dance Company	\$ 50.00		\$ 316.00
8/23/2017	3865	Nathan & Jennifer McGee	\$ 200.00		\$ 516.00
8/29/2017	29265	Hayden Real Estate, Inc.	\$ 1,450.00		\$ 1,966.00
9/6/2017	39105	City of Amboy	\$ 3,670.00		\$ 5,636.00
9/19/2017	17440	Griffco Design/Build Inc.	\$ 50,000.00		\$ 55,636.00
9/20/2017	ETF	Harland Clarke (Checks for Account)		\$ 19.10	\$ 55,616.90
10/2/2017	6520	Larry Farley Insurance Agency, Inc.	\$ 15.00		\$ 55,631.90
10/2/2017		Interest	\$ 4.27		\$ 55,636.17
10/31/2017		Interest	\$ 11.00		\$ 55,647.17
11/30/2017	25173	Illinois River Energy LLC	\$ 1,688.86		\$ 57,336.03
11/30/2017		Interest	\$ 11.39		\$ 57,347.42
12/11/2017	9174	Richard & Doris Kennay	\$ 5,200.00		\$ 62,547.42
12/11/2017	5480	Hvarre Holdings	\$ 400.00		\$ 62,947.42
12/31/2017		Interest	\$ 12.89		\$ 62,960.31
1/31/2018		Interest	\$ 13.32		\$ 62,973.63
2/28/2018		Interest	\$ 12.03		\$ 62,985.66
3/31/2018		Interest	\$ 13.32		\$ 62,998.98
4/18/2018	3102001	Growmark, Inc.	\$ 14,000.00		\$ 76,998.98





To: Enterprise Zone Advisory Board  
From: Andy Shaw, Administrator  
Date: 4/27/2018  
Subject: Report of Activities

---

1. Financial: The project fund report is attached to this month's board material.
2. New abatements More to come, AFC Schools have signed, Ashton Township scheduled for next month, and at mid-year I will have a public hearing to make application to DCEO to add many tax districts.
3. Amboy Application was certified on 4/5/18 and designating units of government got copies of that. Had a late ordinance numbering issue that DCEO allowed to go through, but need to fix a couple that Amboy passed for the next 2 applications.
4. Mount Morris: Mount Morris was sent in and they have had it for almost a month.
5. New 2018 Projects Application: Coming along well, to be submitted upon getting the approval from Department of Agriculture, probably around 3 weeks from now.
6. Oregon: I have made some notes and analysis for old business.
7. MOU/Clawbacks: We now have a MOU incorporated in the project application, will discuss in new business. I was not able to find agreements like an MOU from the old zone projects, but have developed one to match our ordinance & resolutions.
8. Letter on Changed Abatement: This is affecting projects from the old zone in Lee County. Many areas had changes, from the removal of some areas from the map, like Dixon residential projects, to areas where we didn't have every district for tax abatement secured yet in the new zone.
9. Opportunity Zone: IL asked for an extension so we don't yet know which of ours were awarded. Stay tuned between meetings for this.
10. Incentive Reporting Season: This time of year is when businesses report the amount of incentives they obtained in 2017 to the Department of Revenue. Reminders went out in the past few weeks and I have assisted one so far. Refer anyone who is needing assistance to me.
11. Export Award Nominations: Still looking for suggestions in the zone.
12. Website Status: Website at [leeoglezone.com](http://leeoglezone.com). Please give any input you can.
13. Records and Minutes: Getting the records on the website was pushed back a couple months, I expect to get that by our next meeting.
14. Upcoming Conferences Illinois Enterprise Zone Association is May 2-4 in Springfield.
15. Blackhawk Hills Update (CEDS and Water Study): Thanks to those who took part in the Lee and Ogle County CEDS strategy meetings the past couple months. We are also the lead agency for an 11 county water supply study for IDNR and encourage you to participate in and share a 5-6 minute survey on water supply at [www.blackhawkhills.com/watersurvey](http://www.blackhawkhills.com/watersurvey)

To: Lee Ogle Enterprise Zone Advisory Board  
From: Daniel Payette, Executive Director  
Subject: 2018 Enterprise Zone Administration Proposal  
Date: 3/1/2018

---

## **SUMMARY**

The following memorandum outlines Blackhawk Hills Regional Council's (BHRC) renewal proposal for administering the Lee Ogle Enterprise Zone.

## **ENTERPRISE ZONE PROGRAM OVERVIEW**

The Enterprise Zone is a critical partnership of local and state resources supporting business expansion and retention through a package of incentives. Locally, the Lee Ogle Enterprise Zone is a partnership of the cities of Dixon and Rochelle, the counties of Lee and Ogle, and the economic development agencies of LCIDA and GREDCO. With pending amendments to add Amboy and Mount Morris, the zone will have a set of two smaller and two larger municipalities. In the ordinances and intergovernmental agreement for the zone, the parties sensibly addressed administrative funding with contribution sharing formulas and automatic inflationary adjustments.

## **BLACKHAWK HILLS REGIONAL COUNCIL OVERVIEW**

Daniel Payette, BHRC Executive Director

All BHRC activities are coordinated through Payette. Formerly Outreach Coordinator and Planning Manager, he has extensive experience supporting community and economic development, including through implementation of the Economic Development District's Comprehensive Economic Development Strategy (CEDS). He started at BHRC in 2011, enabling the roll out of the region's non-profit gigabit broadband network, iFiber. Payette received his MS from the University of Wisconsin-Madison (Urban & Regional Planning) and BA from Marquette University. He resides in and is a native of Shannon, IL.

Andy Shaw, Zone Administrator, BHRC GIS Mapping and Enterprise Zone Specialist

Shaw is experienced in business development, GIS mapping, demographic analysis, and stakeholder outreach. In 2017, he assumed the administrator role for the zone, following his training and work with previous zone administrator John Thompson. Since joining BHRC in 2013, he has participated in the Illinois Enterprise Zone Association and worked with local zones on expansion proposals, eligibility testing, and new applications. He received his MS from Northern Illinois University (GIS & Urban Geography) and BA from Western Illinois University. A native of Carroll County, he worked in the family grocery business and served on the former Carroll County Economic Development Corporation board. He resides in Dixon, IL.

Julie Jacobs, BHRC Office Manager

Jacobs has been with BHRC since 1987 and has extensive knowledge of and experience working with community and economic development stakeholders in the six Blackhawk Hills counties. Her current duties include grant administration, budgeting, bookkeeping, environmental issues and economic development support, and marketing activities. She resides in Sterling.

### **ZONE ADMINISTRATION DUTIES & RESPONSIBILITIES**

The following administrator duties & responsibilities are anticipated:

1. Comply with all program requirements and requests for information from Illinois Department of Revenue (IDOR) and Illinois Department of Commerce and Economic Opportunity (DCEO).
2. Function as liaison between participating cities, counties, economic development organizations (EDOs), taxing districts, IDOR, DCEO, any other state agency, and any federal agency in matters affecting the zone.
3. Collect data and issue reports requested by the advisory board, state government, and other entities as appropriate.
4. Continue to approach taxing districts and obtain abatement resolutions to obtain the most complete abatement coverage possible for the zone.
5. Act as public affairs liaison between the media and the advisory board.
6. For new projects that meet local zone and state program requirements:
  - a. Run suitability analyses upon request;
  - b. Issue Building Material Exemption Certificates (BMECs);
  - c. Coordinate with county tax and assessment officials to ensure that abatements are granted as promised;
  - d. Assist applicants with submissions for other zone benefits when applicable, such as Expanded MM&E and Utility Tax Exemptions;
7. Develop a stakeholder marketing plan and support strategy for the zone and implement it.

Address the following components (in-zone properties only):

- a. Initiate strategic Business Retention & Expansion (BR&E) visits and calls, whether or not such properties use zone benefits. Target at least 15 properties per year;
  - b. When invited and scheduling permits, accompany economic development professionals on BR&E visits and encourage the use of all appropriate zone benefits;
  - c. Maintain and improve a website for zone promotion. The website will include the following:
    - i. General information;
    - ii. Interactive mapping and address search feature; zone and TIF overlay (the latter only if available);
    - iii. A list of available industrial properties in the zone, including embedded Location One Information System (LOIS) or similar platform;
    - iv. Blog posts and press releases announcing successfully applied incentives;
    - v. Board records, Agendas and meeting minutes;
  - d. Create and oversee targeted education and outreach on social media and news outlets.
8. Coordinate with EDOs and communities on external opportunities as follows:
    - a. Contribute GIS and demographic data analysis for the pursuit of appropriate DCEO and Intersect Illinois RFQs, as well as general site selector inquiries.

- b. Strategically approach entities outside of the zone that might consider new enterprise that would prompt a zone entrance application.
- 9. GIS and demographic data analysis for the pursuit of appropriate DCEO and Intersect Illinois RFQs.
- 10. Collect project fees, as set by the advisory board at .5% of estimated project building materials, and disbursing the collected funds only as authorized by the advisory board for special projects to benefit the zone. These funds shall be segregated as agreed to in the separately executed Fiscal Sponsorship Agreement.
- 11. Conduct ongoing evaluations of the zone program, in consultation with the advisory board, and submit reports concerning the effectiveness of the zone on a semi-annual basis to all participating agencies in the designating ordinance.
- 12. Assist expired zone users in the issuance of new BMECs for ongoing projects in the new zone and with the filing of mandated reports of zone activity for prior calendar years. Note: While we can assume no liabilities for projects initiated prior to January 1, 2017, we will make all reasonable efforts to assist those clients with issues arising from the expired zone, including reporting for projects from the expired zone.

**ZONE ADMINISTRATION BUDGET & BILLING**

<u>Entity</u>	<u>Annual Contribution</u>	<u>Fixed Expense</u>	<u>Annual Cost</u>
Lee County	\$10,574.00	Personnel	\$35,600.00
Ogle County	\$7,778.00	Fringe	\$10,150.72
City of Dixon	\$22,508.00	Travel	\$1,765.49
City of Rochelle	\$23,866.00	Other/Indirect	\$6,714.60
City of Amboy	\$670.00		
Village of Mount Morris	\$1,750.00	Non-Fixed Expense *see note	Annual Cost
		Contractual/Marketing	\$12,915.19
<b>Total Contributions</b>	<b>\$67,146.00</b>	<b>Anticipated Expenses</b>	<b>\$67,146.00</b>

Anticipated expenses for zone administration, support staff, travel, equipment, supplies, marketing, contractual, overhead, etc. Expense line items are approximate and may not represent exact distributions. Other/indirect considers administration and overhead, as well as supplies, equipment, and software/hardware.

\*The non-fixed category titled “Contractual/Marketing” includes consulting & legal expenses, as well as zone-specific development and marketing (e.g., website development & deployment). This category, when remainder amounts are deemed as excess by BHRC and the board at the end of a calendar year, shall have that excess portion returned to the project fund. The status of this category shall be updated regularly by the administrator for the board.

BHRC will bill each entity for its respective contribution each year. For calendar year 2018, billing will be in March and follow the amounts stated in the ordinance and this agreement. In future years it shall be



in January. With future year's contribution, contributors shall escalate the total budget by the most recent rolling 3-year rolling average of the October CPI index, per the designating ordinance.

GIS Mapping & Enterprise Zone Specialist Andy Shaw will be assigned administrator duties. Office Manager Julie Jacobs will be tasked with supporting the administrator.

**ZONE ADMINISTRATION TERM & RENEWAL**

BHRC's continued administration of the zone will commence on the date of proposal acceptance.

It will continue for an initial term of twenty-four months, will be renewed automatically for subsequent terms of twenty-four months, or until the zone is terminated, as long as the advisory board and BHRC see fit to maintain the administration arrangement.

If the advisory board or BHRC wishes to discontinue this arrangement, advanced notice of sixty days is required to be given by either party to allow for proper transition.

Signature (BHRC)

Daniel Payette

Name

4/27/2018

Date

Signature (City of Amboy)

John Schonberger

Name

5-7-18

Date

Signature (City of Dixon)

Li Arellano, Jr

Name

April 27, 2018

Date

Signature (City of Rochelle)

Chet Olson

Name

April 27, 2018

Date

Signature (County of Lee)

JAMES WENTLING

Name

5-8-18

Date

Signature (County of Ogle)

Kim P. Grocker

Name

April 27, 2018

Date

Signature (Village of Mount Morris)

Dan Elsasser

Name

5/8/18

Date



To: Enterprise Zone Advisory Board  
From: Andy Shaw, Administrator  
Date: 4/27/18  
Subject: Analysis of Oregon Proposal

---

In regards to the Oregon proposal:

- Abatement resolutions are not needed since all areas are in TIF zones.
  - This brings an interesting dilemma since this precludes essentially half of the benefit of the enterprise zone tool, the property tax abatement, which cannot be used in a TIF under IL statute.
- Area utilized questions: Post-Amboy-MM-2018 Projects, we have 723.51 acres remaining. Oregon is asking for 89 acres, and probably need 5-6 more to connect to Mount Morris with a 3 foot strip.
  - Questions have come up about how many acres each county has left to use. I have not seen any reference to a strict rule for this in our documents.
  - The original zone was 51% Lee and 49% Ogle. The most recent summary showed 50.18% to Lee and 49.82 to Ogle.
  - I don't believe the unallocated space had any restriction on it, but if anything we may think of it as 50/50 between the counties.
- Criteria Questions:
  - I would like to see us utilize a more rigorous criteria, as outlined on the following page that is adapted from the discussion we had several months ago.
    - The primary difference is the addition of looking for a specific significant project or project site that is asking the city or village for the zone. We needed letters of commitment from firms to have on our state application to show what types of investment we would have if we were to be awarded the zone designation.
    - I would like to see such a letter of commitment from an intended primary zone user that will outline their intent, or see a .
    - I think Oregon meets these criteria, except maybe we need to see some demand for the incentive from a large player like a FN Smith, etc.
    - In defense of adding this, I would say that both Amboy and Mount Morris essentially met this with their significant sites like Sensient, Maplehurst, the former Quad plant, and the large shovel-ready farm SE of Mount Morris.



## CRITERIA FOR MUNICIPAL EXPANSION OF THE ENTERPRISE ZONE (NEW UNDERLINED)

### Primary Criteria

1. Is the zone expansion being driven by an industrial or larger-scale use of the zone incentives on a specific site? **REQUIRED**
2. Is there a letter of commitment from a company that will locate or expand here due to EZ status? This letter should state the expected timeline, jobs, and investments to be made by the company. **REQUIRED**

### Site-Specific Criteria

#### THESE CRITERIA ARE SPECIFIC TO SITES FOR LARGER-SCALE INDUSTRIAL AREAS

3. Was the site in the previous EZ? Does it have a company from the old EZ? **HELPFUL, NOT REQUIRED**
4. Is the site owned by a willing seller? Is site optioned and for how long? **SHOULD BE YES**
5. Infrastructure to the proposed EZ site? (water, sewer, power, natural gas, fiber, roads and truck routes, rail) Plans to expand capacity to site? **SHOULD HAVE SUFFICIENT LEVEL OF INFRASTRUCTURE**
6. Is the site annexed (all zone areas must be annexed); and zoned for intended commercial or industrial use; or in a comprehensive plan identifying the site for future industrial or commercial use? **SHOULD BE YES**
7. Are geotechnical/topo engineering studies completed for the site? **SHOULD BE YES**
8. Brownfield site? Need for Phase I environmental study? **SHOULD BE ADDRESSED IF THIS IS A FACTOR**
9. Has stormwater and drainage for the site been identified? **SHOULD BE ADDRESSED FOR UNBUILT SITES**

### Municipal Criteria

10. Does the community support industrial development? **SHOULD BE YES**
11. Will the expanded zone area and expanded LLMA pass 3 of the 10 criteria for state approval? **SHOULD BE YES**
12. Infrastructure capacity supports growth? (water, sewer, power, natural gas, fiber, roads (Truck Route?), rail access?) Plans to expand capacity? **SHOULD BE YES**
13. Are the other taxing districts willing to accept the tax abatement schedule of the EZ (Goal is to have all tax districts)? **SHOULD BE YES**
14. Will the municipality agree to the funding agreement to pay one-time costs for application and to annually employ the zone administrator? **SHOULD BE YES**
15. Will the municipality cooperate with the other zone governments to pass future amending ordinances in a timely manner? **SHOULD BE YES**

December 1, 2015

Greater Rochelle Economic Development Corporation  
420 N. 6<sup>th</sup> St.  
Rochelle, IL 61068

On behalf of Rochelle Foods, LLC, I want to provide my recommendation that the proposed Lee-Ogle County Enterprise Zone is approved.

Rochelle Foods, LLC, is planning to spend **forty million dollars in capital investment** for the expansion of our bacon production operations. This investment into the community will **create more than 110 jobs** for the Rochelle area. We are hoping that our company's continued success will support future growth and corresponding opportunities for additional investment in facilities, equipment and additional job creation.

In today's world, companies like ours have many competitive options regarding the location of our facilities. Incentives available through an enterprise zone are a significant part of the consideration of where we choose to make these investments.

We support the City of Rochelle's efforts to create the Lee-Ogle County Enterprise Zone, which will dramatically improve the competitiveness of this region and facilitate the creation of additional investments and jobs in the Rochelle community.

Sincerely,



William H. Rice  
Plant Manager – Rochelle Foods, LLC

**Lee Ogle Enterprise Zone Area and Funding Formula  
for EZ Administration Operating Expense**

2010 US Census Population Lee & Ogle Counties

Dixon	15,692	Rochelle	9,574	Both County Pop.	89,528
Amboy	2,404	Mount Morris	2,998	Budget of \$.75 Per Capita	
Lee	36,031	Ogle	53,497	for EZ Admin=	\$67,146.00

<u>LEE COUNTY PORTION</u>	<u>% of Zone</u>	<u>OGLE COUNTY PORTION</u>	<u>% of Zone</u>
to Uninc. Lee	3,206.40 acres 36.12%	to Uninc. Ogle	1,066.92 acres 12.02%
To Dixon	1,161.48 acres 13.08%	To Rochelle	3,149.80 acres 35.48%
To Amboy	73.97 acres 0.83%	To Mount Morris	193.43 acres 2.18%
50% Connector Strips	12.25 acres 0.14%	50% Connector Strip	12.25 acres 0.14%

Area To Lee County: 4,454.10 acres 50.18%, Area To Ogle County: 4,422.39 acres 49.82%

Zone Parcel Acreage	8,852.00 acres	99.72%
Connector Strips	24.49 acres	0.28%
Total Zone Area	8,876.49 acres	100.00%
Total Area allocated to Zone	8,876.49 acres	92.46%
Acres in reserve (unallocated)	723.51 acres	7.54%
Max acres per Statute	9600.00 acres	100.00%

<u>LEE COUNTY FINANCIAL SHARE</u>		<u>OGLE COUNTY FINANCIAL SHARE</u>	
Lee County Share	\$10,574.00	Ogle County Share	\$7,778.00
Dixon Share	\$22,508.00	Rochelle Share	\$23,866.00
Amboy Share	\$670.00	Mount Morris Share	\$1,750.00
50.18% of Budget	\$33,752.00	49.82% of Budget	\$33,394.00

Total Budget for Administration \$67,146.00

This budget shall be adjusted each year for the following year according to the 3-year rolling average of each year's annualized October CPI published by the US-BLS.

SECTION 4: In all other respects Ordinance No. 45-OH, as amended, shall remain in full force and effect.

SECTION 5: Amendment 3 to Addendum A, "Lee Ogle Enterprise Zone Description for Recording," shall include Lee and Ogle County Parcel Identification Numbers (PINs) for these project areas, along with a description of the connecting strip from each to the present Zone, a copy of which is attached hereto and made a part hereof.



**PROJECT APPLICATION and MEMORANDUM OF UNDERSTANDING**

**Please Print**

Business Name: \_\_\_\_\_

Federal Employer Identification Number (FEIN): \_\_\_\_\_

IL Unemployment Insurance Number: \_\_\_\_\_

Project address: \_\_\_\_\_

County Parcel ID #: \_\_\_\_\_

Owner or Contact Person: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Business Phone #: \_\_\_\_\_ Cell #: \_\_\_\_\_

Email: \_\_\_\_\_

**Business owner (if different from above contact)**

Name of Individual or Company: \_\_\_\_\_

Business Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Cell #: \_\_\_\_\_

Email address: \_\_\_\_\_

**Project Information**

Type of Business: \_\_\_\_\_ Commercial \_\_\_\_\_ Industrial

Product(s) or Service Offered: \_\_\_\_\_

Description of project: \_\_\_\_\_

Does this project involve a move from another location? \_\_\_\_\_ Where from? \_\_\_\_\_

Estimated Date of Project Start: \_\_\_\_\_ Expected Completion Date: \_\_\_\_\_

Building Permit Number \_\_\_\_\_ Date Issued \_\_\_\_\_ Issued By \_\_\_\_\_

**NOTE: A COPY OF THE BUILDING PERMIT AND THE ZONE APPLICATION FEE MUST ACCOMPANY APPLICATION, BEFORE PROJECT WILL BE APPROVED.**

**Direct Questions to: Lee-Ogle Enterprise Zone Administrator Andy Shaw**

**Phone: (815)625-3854**

**Email: [leeoglezone@blackhawkhills.com](mailto:leeoglezone@blackhawkhills.com)**

**Project Cost Estimation (must coincide with declarations on building permit)**

Project Cost \$ \_\_\_\_\_

Actual (if known) or Estimated Building Materials Cost \_\_\_\_\_

Anticipated Building Materials Tax Exemption (Materials x local sales tax rate) \_\_\_\_\_

Estimated Labor Cost \$ \_\_\_\_\_

Capital Equipment \$ \_\_\_\_\_

Site Costs (purchase and preparation) \$ \_\_\_\_\_

**Fee Calculation (fee is only charged once to a project, Building Material Exemption Certificates (BMEC) are issued without fee to all contractors). Fee is .5% of Project Materials, not to exceed \$50,000.**

Actual (if known) or Expected Building Materials Cost X .005 = \_\_\_\_\_ Zone Fee to remit to:

**Blackhawk Hills Regional Council**

(W-9 Available upon Request)

**309 First Avenue**

**Rock Falls, IL 61071**

**Required FTE Jobs/Employment Data**

Current Number of Full-time Equivalent (FTE) Jobs \_\_\_\_\_

Jobs Retained due to project \_\_\_\_\_

Jobs Created at end of project \_\_\_\_\_

Estimated Number of project construction jobs \_\_\_\_\_

**MEMORANDUM OF UNDERSTANDING**

- **Project owners shall truthfully complete this form with investment/ job intentions.**
- **Project owners shall commit to maintain 75% or greater of the jobs created or retained, and could risk future years of local property tax abatement if 75% of jobs are not maintained.**
- **State-mandated reporting: All businesses with zone benefits must report abatements and incentives annually at: <http://tax.illinois.gov> Failure can result in incentive(s) suspension. (See zone administrator with questions about reporting.)**
- **Local reporting: Upon completion of the project, owner shall inform the zone administrator.**

Signature: \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

Zone Administrator Signature: \_\_\_\_\_ Date \_\_\_\_\_

**Direct Questions to: Lee-Ogle Enterprise Zone Administrator Andy Shaw**

**Phone: (815)625-3854**

**Email: [leeoglezone@blackhawkhills.com](mailto:leeoglezone@blackhawkhills.com)**



**BUILDING MATERIALS EXEMPTION CERTIFICATE APPLICATION INSTRUCTIONS**

(Required for each vendor or contractor who is purchasing or ordering materials)

Important Note: If you have a contract and are going to be providing building materials for a project located within the Enterprise Zone, you must complete the Building Materials Exemption Certificate (BMEC) Application for submission by the Zone Administrator to Illinois Department of Revenue (IDOR). Your BMEC will not be eligible before the project is certified and certificate(s) are issued by IDOR.

Each Enterprise Zone Project Contractor must have its own BMEC issued by IDOR before they may order or purchase any exempt building materials.

**Project/Company Owner Name and Project Address:** This is where you will be using the building materials.

**Contractor Business Name and Address:** Your company name and mailing address.

**Contractor Email:** Where BMEC document will be emailed when issued. This email address will also be used by the State of Illinois to send reminders of reporting deadlines. If you have projects in other Illinois Enterprise Zones, coordinate who in your company should get these communications and keep it consistent with your other projects.

**Contractor/Owners FEIN#:** Contractor's FEIN#, An applicant without an FEIN must go to the Department of Revenue's secure website and enter his or her Social Security number. The department will then provide an Applicant ID, which the applicant can bring to the Zone Administrator to complete the application.

**Contractor's Phone and Cell #:** We must have both business and cell numbers.

<b>Contract information: EXAMPLE:</b>	\$6,013,305.00	Total Contract Amount (Materials & Labor)
	X <u>50%</u>	Percentage of contract that consists of building materials qualifying for exemption
	= \$3,006,652.50	Estimated amount of building materials
	X's <u>7.75%</u>	Local Tax Rate (Project address tax rate)
	= \$233,015.56	Estimated amount of exemption for purchased materials (sales tax saved)

**Completion Date:** This is an estimated date your portion of the project will be finished purchasing and/or ordering materials for your portion of the project. Please allow yourself a bit of overage time as weather and delays can change when you expected to be complete.

**Number of contractor jobs on site:** Estimate the number of employees you will use on this project's site.

**Signature, Title and Printed Name:** These are necessary for the Enterprise Zone Office to contact you with question about the application. We cannot proceed with the IDOR process without all the questions answered.

**Direct Questions to: Lee-Ogle Enterprise Zone Administrator Andy Shaw**  
Phone: (815)625-3854 Email: [LeeOgleZone@BlackhawkHills.com](mailto:LeeOgleZone@BlackhawkHills.com)



**BUILDING MATERIALS EXEMPTION CERTIFICATE APPLICATION**

(Required for each vendor or contractor who is purchasing or ordering materials)

**PROJECT #** \_\_\_\_\_  
# issued by Zone Administrator

All items must be completed on this form before the administrator will submit application to the Illinois Department of Revenue for a Building Materials Exemption Certificate to the contractor and or project owner for the address declared on this application. Each contractor must have their own issued Building Materials Exemption Certificate issued by the Department of Revenue.

**NO BUILDING MATERIALS EXEMPTIONS ARE ALLOWED, BY LAW, BEFORE THE CERTIFIED DATE.**

Project /Company Owner Name: \_\_\_\_\_

Project Address: \_\_\_\_\_

Contractor Business Name: \_\_\_\_\_

Contractor Address: \_\_\_\_\_  
(If PO Box, Also List Street Address)      City      State      Zip Code

Contractor Email Address: \_\_\_\_\_  
(Must have to apply)

Contractors Phone#: \_\_\_\_\_ Cell#: \_\_\_\_\_

FEIN # or Applicant ID#: \_\_\_\_\_

*If you do not have a FEIN # you must go to the Illinois Department of Revenue website and apply for Applicant ID # before this application may be processed.*

1. Total Contract Amount (Materials and Labor)		Your Total Bid With Tax
2. Local Tax Rate	%	Project Location Tax Rate
3. Percentage of Contract that is materials (whole numbers only)	%	Round up for estimate
4. Estimated amount of materials for this project		(#1 X #3)
5. Estimated amount of Sales Tax Exemption on purchased materials		(#4 X #2)
6. Estimated Labor Cost		

Contractor's Completion Date: \_\_\_\_\_ Number of Contractor Jobs on Site: \_\_\_\_\_

Signature: \_\_\_\_\_ Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_

***Please Note reporting requirements by law: All businesses or contractors with BMEC's issued must annually report the annual value of purchases made using the certificate for the project location listed on the certificate, at: <http://tax.illinois.gov/>***

**Direct Questions to: Lee-Ogle Enterprise Zone Administrator Andy Shaw**

**Phone: (815)625-3854 Email: [LeeOgleZone@BlackhawkHills.com](mailto:LeeOgleZone@BlackhawkHills.com)**

February 16, 2018

The Honorable Bruce Rauner  
Governor of Illinois  
207 State House  
Springfield, IL 62706

Dear Governor Rauner:

We, the representatives of Northwest Illinois' Community and Economic Development Organizations, request that you nominate the following eligible Census tracts for consideration as Opportunity Zones, as defined in 26 CFR 601.601. A brief description of each tract area, including the method of eligibility determination, list of potential development projects (where applicable), and general tract background, is included in the subsequent pages.

We look forward to participating in this nascent program as it develops and hope that it will prove fruitful for the state and Jo Daviess, Stephenson, Carroll, Ogle, Whiteside, and Lee counties in Northwest Illinois. Please do not hesitate to contact Daniel Payette, Executive Director, Blackhawk Hills Regional Council, at 815.625.3854 or [daniel.payette@blackhawkhills.com](mailto:daniel.payette@blackhawkhills.com) with any questions.

Sincerely,

[Redacted Signature]

Daniel Payette, Executive Director  
Blackhawk Hills Regional Council

Lisa McCarthy, Executive Director  
Tri-County Economic Dev. Alliance

[Redacted Signature]

Jason Anderson, Executive Director  
Greater Rochelle Economic Dev. Corp.

Heather Sotelo, Executive Director  
Greater Sterling Dev. Corp.

[Redacted Signature]

Gary Camarano, Director  
Whiteside County Economic Dev.

Greg Sparrow, Community Economic Dev. Rep.  
Ogle County

[Redacted Signature]

Kim Ewoldson, Executive Director  
Morrison Area Dev. Corp.

William Wescott, Mayor  
City of Rock Falls

[Redacted Signature]

Kevin Marx, Executive Director  
Lee County Industrial Dev. Assoc.

David Young, Executive Director  
Northwest Illinois Dev. Alliance

Enclosures

Cc: Sen. Tammy Duckworth  
Sen. Richard Durbin  
US Rep. Cheri Bustos  
IL Sen. Neil Anderson  
IL Sen. Tim Bivins  
IL Rep. Toni McCombie  
IL Rep. Tom Demmer  
IL Rep. Brian Stewart  
Dir. Sean McCarthy, DCEO  
Lanae Clarke, DCEO  
John Duncan, DCEO  
Adrian Madunic, DCEO

## Regional List of Tracts Requested to be Nominated

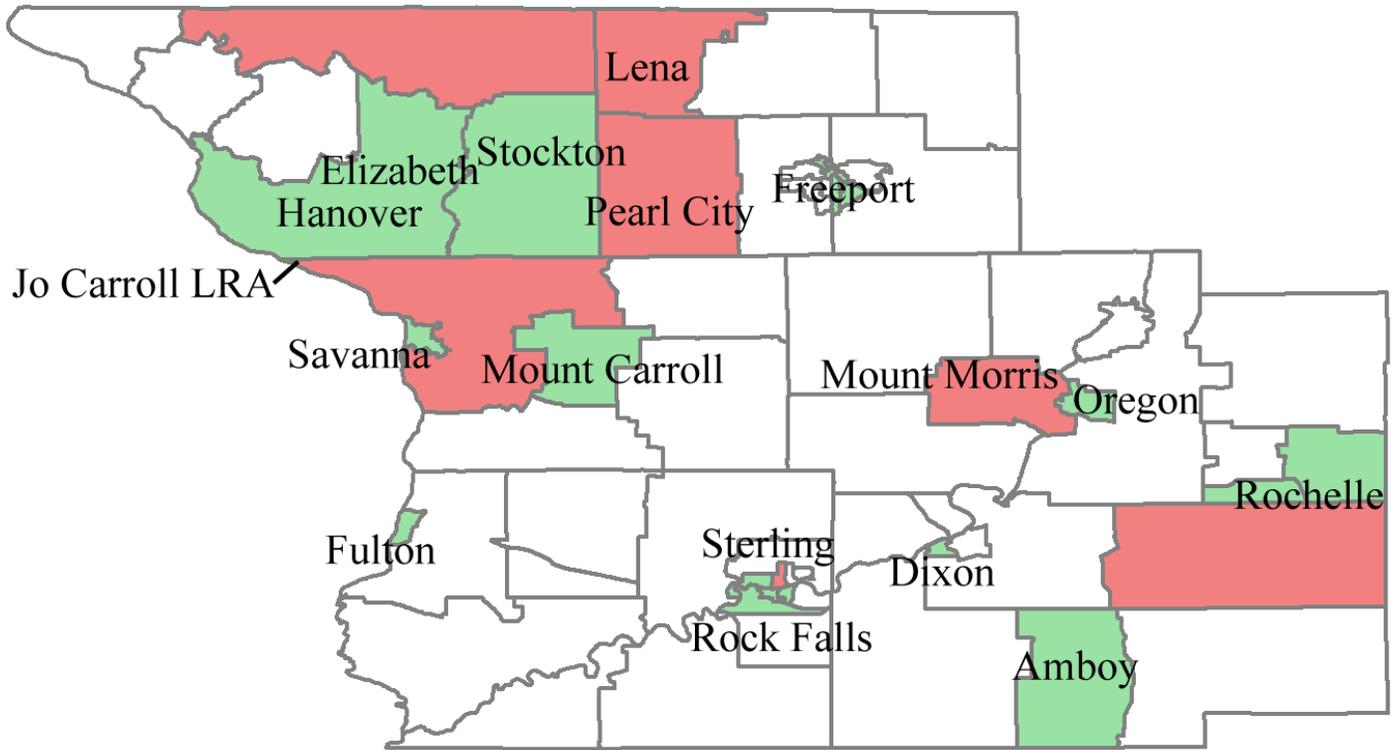
Includes 24 of 35 eligible tracts, including 7 of 10 eligible contiguous tracts.

Notes:

- Met Criteria = met criteria using 2015 or 2016 ACS data
- Met Contiguous Criteria = met contiguous criteria using 2015 or 2016 ACS data

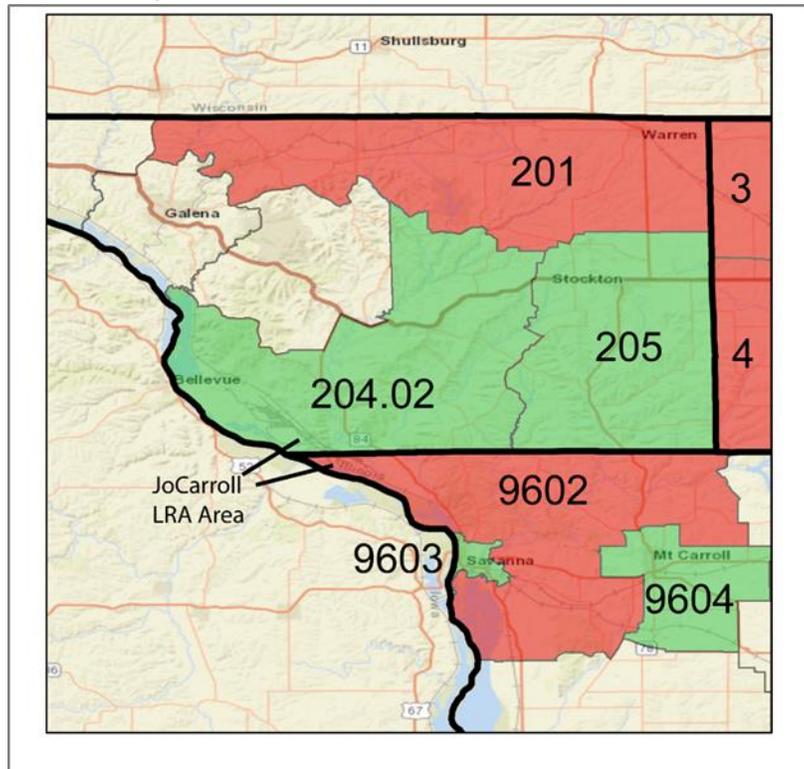
Tract Number	Tract Description	Criteria
17015960200	Census Tract 9602, Carroll County, Illinois	Met Contiguous Criteria
17015960300	Census Tract 9603, Carroll County, Illinois	Met Criteria
17015960400	Census Tract 9604, Carroll County, Illinois	Met Criteria
17085020100	Census Tract 201, Jo Daviess County, Illinois	Met Contiguous Criteria
17085020402	Census Tract 204.02, Jo Daviess County, Illinois	Met Criteria
17085020500	Census Tract 205, Jo Daviess County, Illinois	Met Criteria
17103000100	Census Tract 1, Lee County, Illinois	Met Contiguous Criteria
17103000600	Census Tract 6, Lee County, Illinois	Met Criteria
17103000800	Census Tract 8, Lee County, Illinois	Met Criteria
17141960900	Census Tract 9609, Ogle County, Illinois	Met Contiguous Criteria
17141961100	Census Tract 9611, Ogle County, Illinois	Met Criteria
17141961400	Census Tract 9614, Ogle County, Illinois	Met Criteria
17141961600	Census Tract 9616, Ogle County, Illinois	Met Criteria
17177000300	Census Tract 3, Stephenson County, Illinois	Met Contiguous Criteria
17177000400	Census Tract 4, Stephenson County, Illinois	Met Contiguous Criteria
17177000800	Census Tract 8, Stephenson County, Illinois	Met Criteria
17177001200	Census Tract 12, Stephenson County, Illinois	Met Criteria
17177001300	Census Tract 13, Stephenson County, Illinois	Met Criteria
17195000500	Census Tract 5, Whiteside County, Illinois	Met Criteria
17195001000	Census Tract 10, Whiteside County, Illinois	Met Criteria
17195001100	Census Tract 11, Whiteside County, Illinois	Met Contiguous Criteria
17195001500	Census Tract 15, Whiteside County, Illinois	Met Criteria
17195001600	Census Tract 16, Whiteside County, Illinois	Met Criteria
17195001700	Census Tract 17, Whiteside County, Illinois	Met Criteria

# Regional Map of Tracts Requested to be Nominated



-  Not Nominated
-  Contiguous '15 or '16
-  Met Criteria in '15 or '16

## Jo Daviess/Carroll Profile



### Tracts:

- Jo Daviess 201, 204.02, 205
- Carroll 9602, 9603

**Closest municipalities:** Stockton, Elizabeth, Hanover, Savanna, and JoCarroll LRA Area  
**County:** Jo Daviess and Carroll

**Dataset used:** 2015 and 2016 ACS

**Poverty qualified:** Yes (9603)

**Median household income qualified:** Yes (204.02, 205, 9603)

**Contiguous qualified:** Yes, Jo Daviess 201 and Carroll 9602

\*Note: tracts 3, 4, and 9604 described elsewhere

\*Note: numerous tracts selected to ensure inclusion of JoCarroll LRA Area (former army depot)

### Eligibility calculation:

- Jo Daviess 204.02, in 2016 ACS dataset, had household median income of \$44,281, or 72.64% of the statewide median.
- Jo Daviess 205, in the official 2015 dataset, had household median income of \$46,357, 77.14% of the statewide median.
- Carroll 9603, in the official 2015 dataset, had household median income of \$41,693 or 69.38% of statewide median, and 20.5% poverty.

### Contiguous Eligibility calculation:

- Jo Daviess 201 (contiguous with 205), in official 2015 dataset, had household income of \$48,526, which was not greater than 125% of Jo Daviess 205, which had \$46,357 ( $46,357 \times 125\% = \$57,946$ )
- Carroll 9602 (contiguous with 205), in official 2015 dataset, had household income of \$54,127, which was not greater than 125% of Jo Daviess 205, which had \$46,357 ( $46,357 \times 125\% = \$57,946$ )

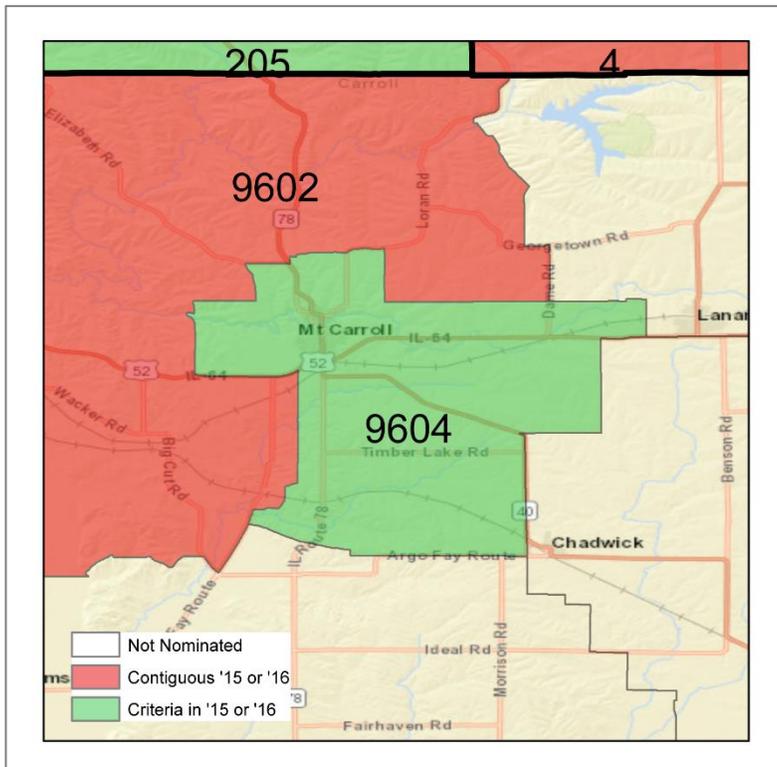
### Prospective/ongoing projects:

- Considering riverfront redevelopment (working to improve road/rail access to Mississippi River)
- Ongoing base Realignment and Closure redevelopment of JoCarroll LRA Area (former army depot)
- Restaurant and lodging expansion in Elizabeth and Stockton (gateway to #2 IL tourism destination)
- Manufacturing proposal in Savanna (50 – 75 jobs, \$10 million)

### Other features or concerns:

- 3 enterprise zones
- Multiple TIF districts
- Federal Economic Development Administration investments in a distressed area
- Dura shedding jobs in Stockton and shuttering of Invensys in Hanover

## Mount Carroll Profile



Tracts: Carroll 9604

Closest municipality: Mount Carroll  
County: Carroll

Dataset used: 2016 ACS

Poverty qualified: No

Median household income qualified: Yes  
(9604)

Contiguous qualified: n/a

\*Note: tracts 205, 4, and 9602 described elsewhere

**Eligibility calculation:** 2016 Household Median Income of \$42,262 or 69.33% of Statewide Median

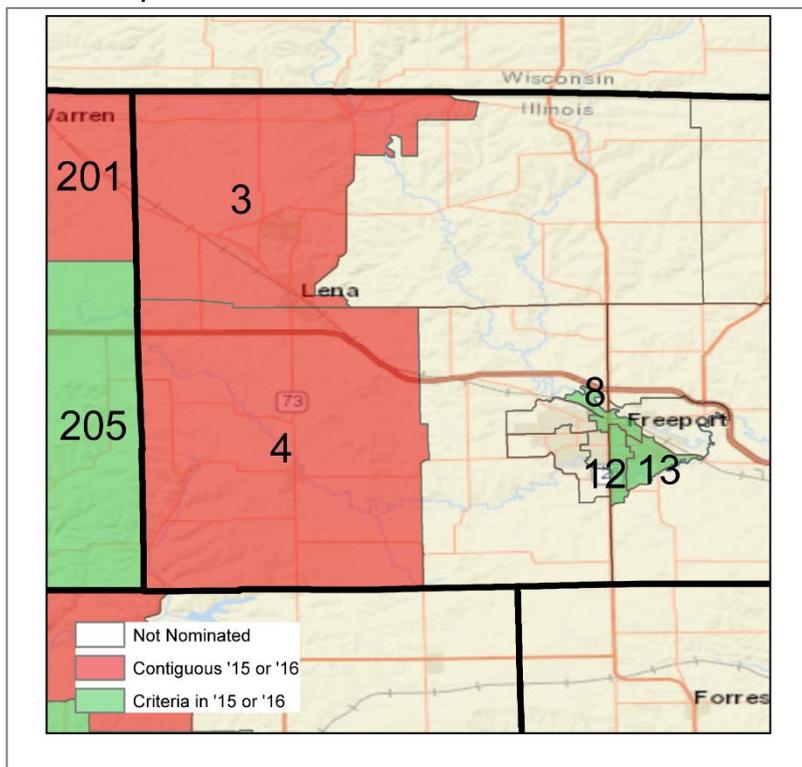
### Prospective/ongoing projects:

- Improving downtown
- Infrastructure improvement on deck with new sewer treatment plant
- Historic campus (Campbell Center for Historic Preservation Studies) is falling into bankruptcy and this area is a major concern for revitalization, the south city gateway is a dilapidated college campus with great potential.
- Downtown redevelopment, including bakery, boutique hotel, and Community Development Corporation-owned restaurant

### Other features or concerns:

- Enterprise zone
- TIF district
- National Register of Historic Places
- Opportunity to revitalize sprawling, but vacant liberal arts campus of historic value

## Rural Stephenson Profile



**Tracts:** Stephenson 3, 4

**Closest municipality:** Freeport

**County:** Stephenson

**Dataset used:** 2015 and 2016 ACS

**Poverty qualified:** No

**Median household income qualified:** No

**Contiguous qualified:** Yes (3, 4)

\*Note: tracts 201, 205, 8, 12, 13 described elsewhere

**Eligibility calculation:** n/a

### Contiguous Eligibility calculation:

- Stephenson 3 (contiguous with 205), in official 2015 dataset, had household income of \$54,187, which was not greater than 125% of Jo Daviess 205, which had \$46,357 ( $46,357 \times 125\% = \$57,946$ )
- Stephenson 4 (contiguous with 205), in official 2015 dataset, had household income of \$57,498, which was not greater than 125% of Jo Daviess 205, which had \$46,357 ( $46,357 \times 125\% = \$57,946$ )

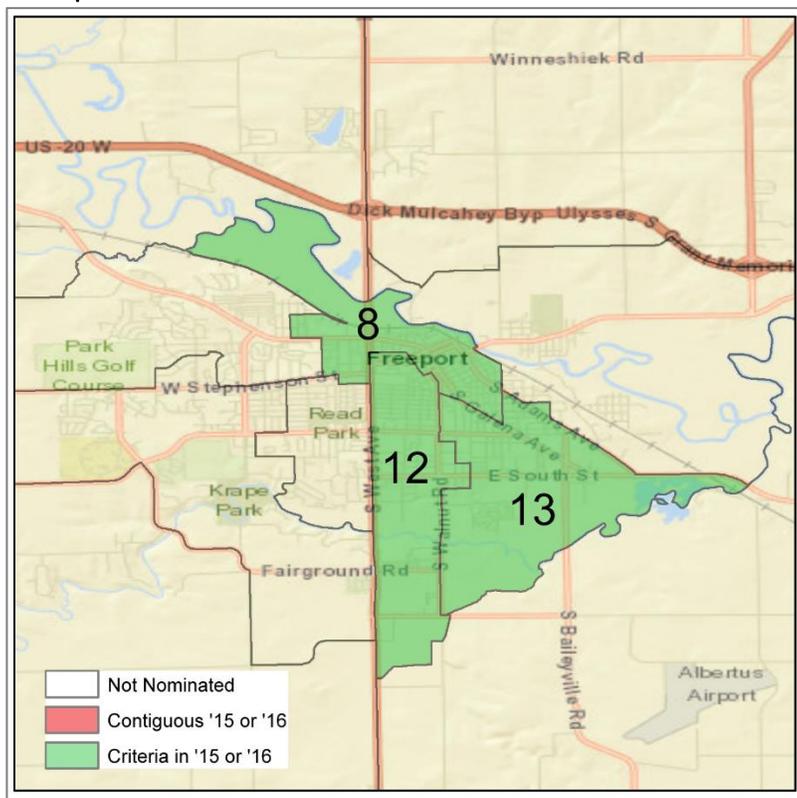
### Prospective/ongoing projects:

- Potential for significant renewable energy project
- Recent investments in value-added agriculture at multiple locations
- Pearl City, a village that has experienced multiple flood events in recent years, continues to seek opportunities for new investment elsewhere in the community

### Other features or concerns:

- Enterprise zone
- Downtown and outskirts redevelopment, including brewery
- Proximity to major ethanol and fertilizer production facilities

## Freeport Profile



Tracts: Stephenson 8, 12, 13

Closest municipality: Freeport

County: Stephenson

Dataset used: 2015 and 2016 ACS

Poverty qualified: Yes (8, 13)

Median household income qualified: Yes (8, 12, 13)

Contiguous qualified: n/a

### Eligibility calculation:

- Stephenson 8, in the official 2015 dataset, had household income of \$24,819 or 41.3% of statewide median, and 36.2% poverty.
- Stephenson 12, in the official 2015 dataset, had household income of \$36,417 or 60.6% of statewide median.
- Stephenson 13, in the official 2015 dataset, had household income of \$35,612 or 59.26% of statewide median, and 26.7% poverty

### Tract 8 prospective/ongoing projects:

- The City of Freeport, the Northwest Illinois Development Alliance (an EDO), and local banking partners are working to redevelop a historic central business district's mixed-use buildings.
- A redevelopment agreement for a twenty-year vacant former manufacturing plant is imminent. A designation will accelerate and enhance this redevelopment.

### Tract 12 prospective/ongoing projects:

- Many vacant retail buildings that are starting to see interest, but with the designation will see a reduced cost of entry/new funding sources for potential projects.

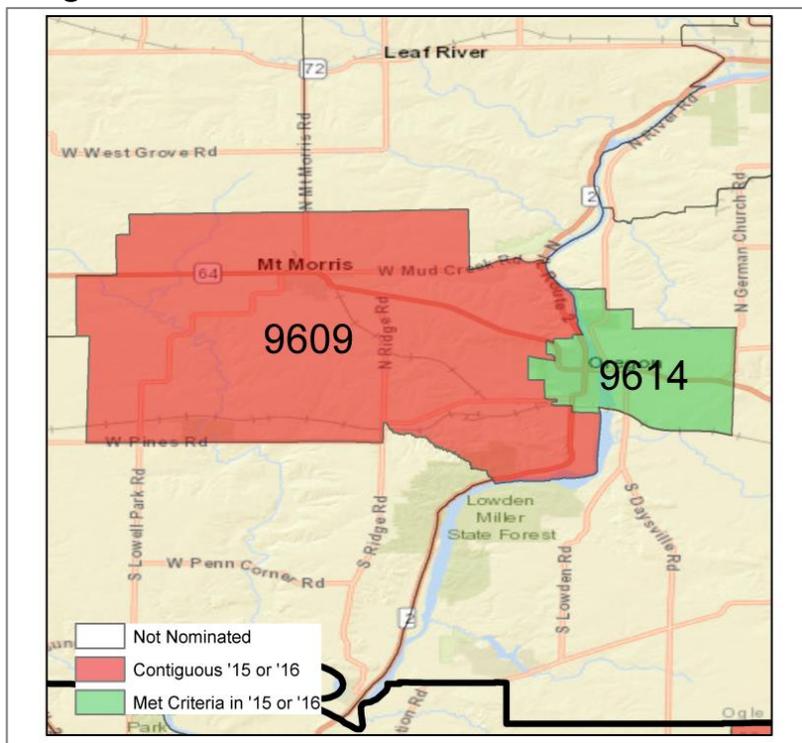
### Tract 13 prospective/ongoing projects:

- This tract is home to several advanced manufacturers who are considering expansion, the opportunity zone will reduce capital costs and enhance these enterprises.

### Other features or concerns:

- Enterprise zone
- Multiple TIF districts

## Oregon-Mount Morris Profile



Tracts: Ogle 9609, 9614

Closest municipality: Oregon and Mount Morris

County: Ogle

Dataset used: 2016 ACS

Poverty qualified: Yes (9614)

Median household income qualified: Yes (9614)

Contiguous qualified: Yes (9609)

### Eligibility calculation:

- Ogle 9614, in the official 2015 dataset, had 20.4% poverty.

### Contiguous Eligibility calculation:

- Ogle 9609, (contiguous with 9614), in the alternate 2016 ACS dataset, had household income of \$50,572, which was not greater than 125% of Ogle 9614, which had \$46,034 ( $46,034 \times 125\% = \$57,542$ )

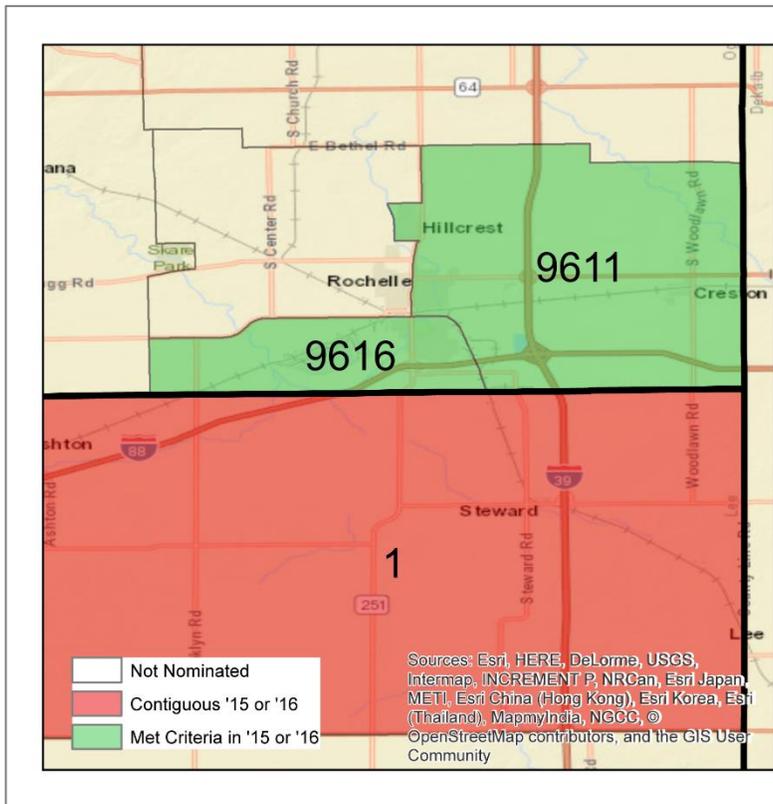
### Prospective/ongoing projects:

- Metal fabrication cluster
- Multi-acre retirement facility under development
- Available former manufacturing plant, representing the hollowed out printing industry
- Ongoing local investment in multiple downtown districts with shuttered storefronts
- Riverfront redevelopment, including potential hotel and riverwalk

### Other features or concerns:

- Enterprise zone
- TIF district
- Extensive sewer and water upgrades in both tracts (current use far below maximum capacity)
- Fiber optic investments
- Rail and rail spur access
- Platted subdivisions with utilities and infrastructure installed

## Rochelle Profile



### Tracts:

- Ogle 9611, 9616
- Lee 1

Closest municipality: Rochelle

County: Ogle and Lee

Dataset used: 2016 ACS

Poverty qualified: No

Median household income qualified: Yes (9611, 9616)

Contiguous qualified: Yes (1)

### Eligibility calculation:

- Ogle 9611, in the official 2015 dataset, had household income of \$46,164 or 76.82% of statewide median.
- Ogle 9616, in the official 2015 dataset, had household income of \$42,036 or 69.95% of statewide median.

### Contiguous Eligibility calculation:

- Lee 1, (contiguous with 9616), in the primary 2015 ACS dataset, had household income of \$52,474, which was not greater than 125% of Ogle 9616, which had \$42,036 ( $42,036 \times 125\% = \$54,545$ )

### Prospective/ongoing projects:

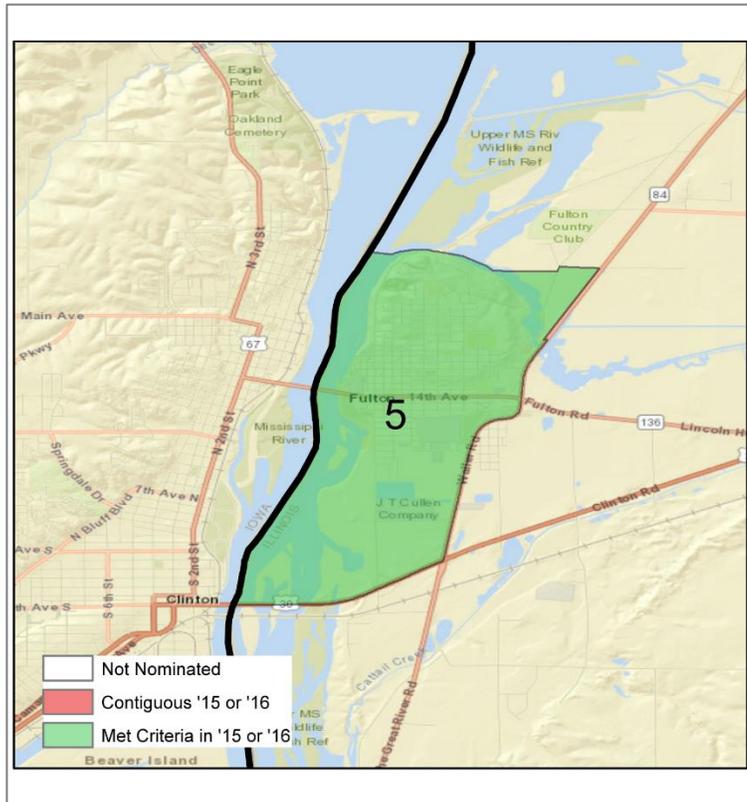
- Downtown redevelopment, including distillery and wellness center
- 2018 Downtown Redevelopment Implementation Plan
- Exploring National Register of Historic Places designation

### Other features or concerns:

- Enterprise zone
- TIF district
- Federal Economic Development Administration investments in a distressed area
- Substantial investments in industrial infrastructure (21" sewer with available capacity, 16" water with available capacity, multiple natural gas lines, truck routes interconnecting with state and interstate highways, capacity to add more industry to vacant sites, most build-ready land zoned and annexed)
- Access to two interstates, two class I railroads, and an intermodal park (Union Pacific)
- Proximity to Rockford, Chicago, and Northern Illinois University

- Concerns about recently laid off Nippon Sharyo workers (nearly 650)

## Fulton Profile



Tracts: Whiteside 5

Closest municipality: Fulton  
County: Whiteside

Dataset used: 2016 ACS  
Poverty qualified: No  
Median household income qualified: No  
Contiguous qualified: n/a

### Eligibility calculation:

- Whiteside 5, in the alternate 2016 ACS dataset, had household income of \$48,221 or 79.1% of statewide median.

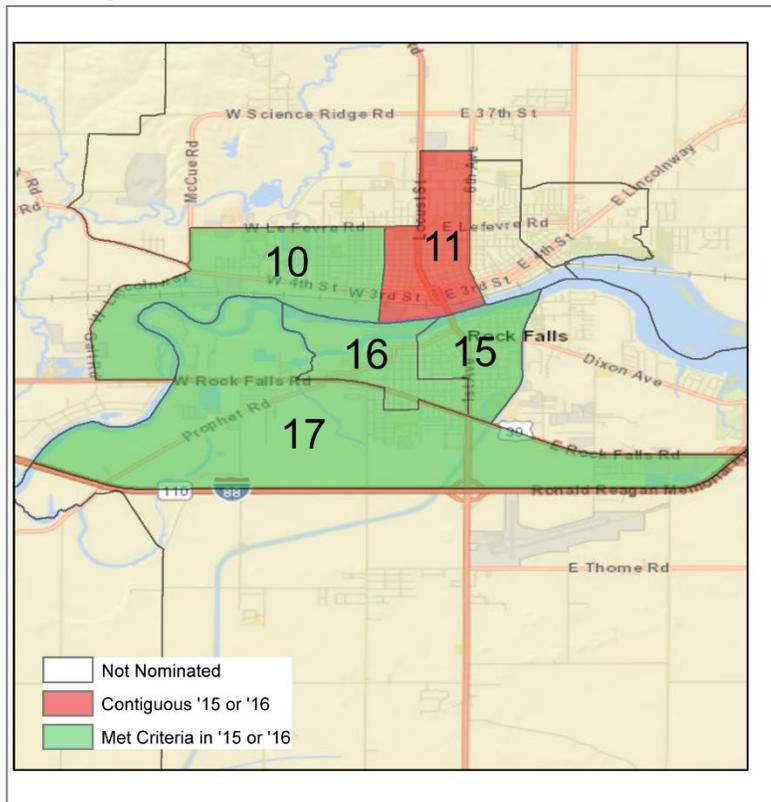
### Prospective/ongoing projects:

- Potential aquaponic project, \$20 million investment, 200 jobs
- Multi-acre solar farm within municipal limits
- Forty-unit multi-family residential construction
- Additional housing demand expected due to opening of new federal prison in nearby Thomson, IL
- Planned expansion by three existing businesses (50 new jobs)

### Other features:

- Enterprise zone
- TIF district
- Revolving loan fund

## Sterling Profile



**Tracts:** Whiteside 10, 11

**Closest municipality:** Sterling  
**County:** Whiteside

**Dataset used:** 2015 and 2016 ACS

**Poverty qualified:** No

**Median household income qualified:** Yes (10)

**Contiguous qualified:** Yes (11)

\*Note: tracts 15, 16, and 17 described elsewhere

### Eligibility calculation:

- Whiteside 10, in the official 2015 dataset, had household income of \$37,282 or 62.04% of statewide median.

### Contiguous Eligibility calculation:

- Whiteside 11, (contiguous with Whiteside 15, nominated separately), in the alternate 2016 ACS dataset, had household income of \$52,533, which was not greater than 125% of Whiteside 15, which had \$45,106 ( $45,106 \times 125\% = \$56,382$ )

### Tract 10 prospective/ongoing projects:

- Highest potential to attract large single corporations
- Recent \$20 million corporate expansion, bringing 250 additional jobs
- Available land in multiple business parks (ample public infrastructure and private utilities)

### Tract 11 prospective/ongoing projects:

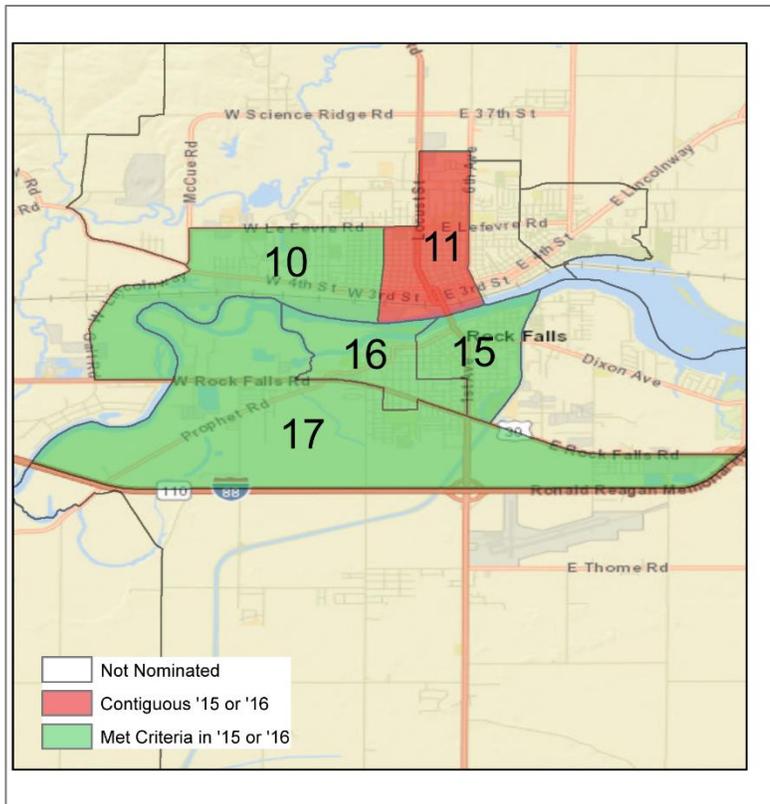
- Highest need tract in City of Sterling for economic development
- Historic riverfront and manufacturing district ready for redevelopment
- Brownfields, abandoned sites, and environmental neglect
- EAV decline of \$12 million since 2010

### Other features or concerns:

- Enterprise zone
- TIF district
- Longstanding relationship with the Economic Growth Corporation, a Community Development Entity

- \$20 million in New Market Tax Credits for FY 2017; \$45 million in NMTC for FY 2016

## Rock Falls Profile



**Tracts:** Whiteside 15, 16, 17

**Closest municipality:** Rock Falls

**County:** Whiteside

**Dataset used:** 2015 ACS

**Poverty qualified:** Yes (15, 17)

**Median household income qualified:** Yes (15, 16, 17)

**Contiguous qualified:** n/a

\*Note: tracts 10 and 11 described elsewhere

### Eligibility calculation:

- Whiteside 15, in the official 2015 dataset, had household income of \$35,828 or 59.62% of statewide median, and 21.2% poverty.
- Whiteside 16, in the official 2015 dataset, had household income of \$40,948 or 68.14% of statewide median.
- Whiteside 17, in the official 2015 dataset, had household income of \$34,867 or 58.02% of statewide median, and 21.1% poverty.

### Tract 15 prospective/ongoing projects:

- Riverfront Development District, recent \$7.6 million hotel with second hotel evaluating adjacent site
- 3 new retailers and 2 recently enhanced existing retailers

### Tract 16 prospective/ongoing projects:

- City of Rock Falls West Industrial Park with available public utilities and infrastructure
- Potential aquaponic project (\$20 million, 200 jobs), metal fabricator (200 jobs), and small manufacturer

### Tract 17 prospective/ongoing projects:

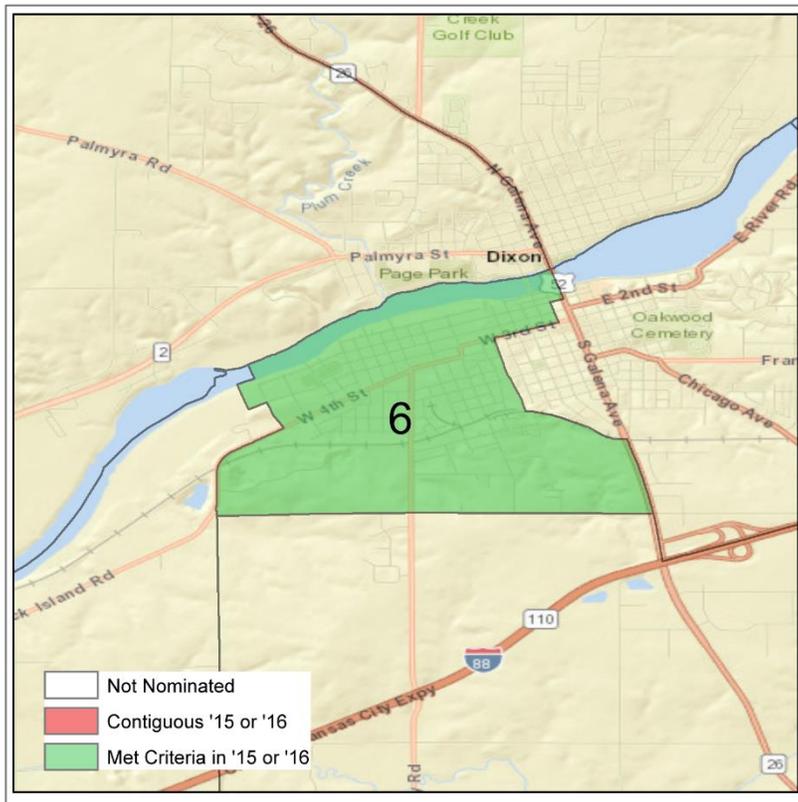
- City has acquired 61 acre site adjacent to Interstate 88, zoned and ready for commercial uses

### Other features or concerns:

- Enterprise zone
- TIF district
- Facade reinvestment program

- Publically-owned local utility

## Dixon Profile



Tracts: Lee 6

Closest municipality: Dixon

County: Lee

Dataset used: 2015 ACS

Poverty qualified: No

Median household income qualified: Yes (6)

Contiguous qualified: n/a

### Eligibility calculation:

- Lee 6, in the official 2015 dataset, had household income of \$37,517 or 62.43% of statewide median.

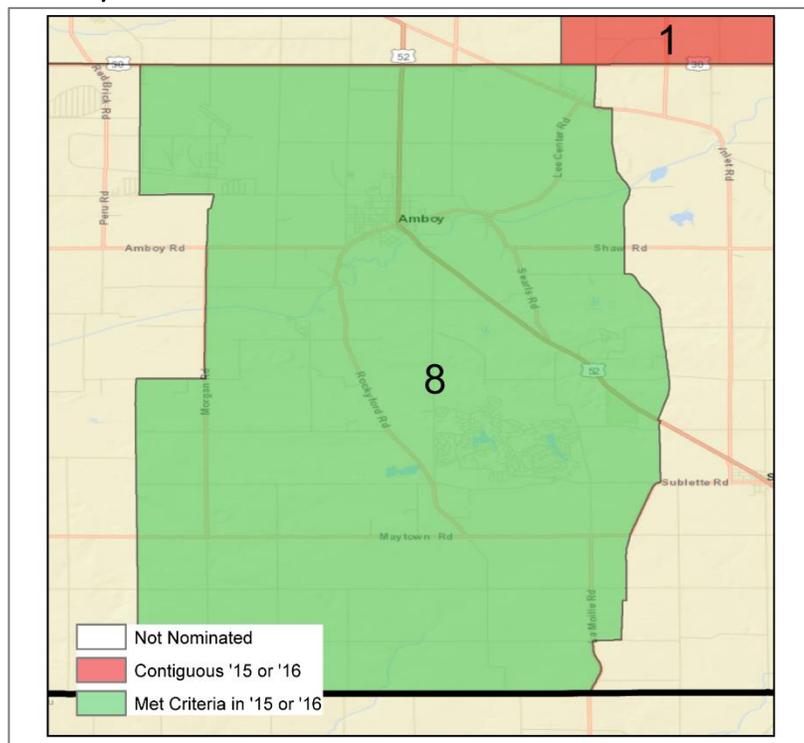
### Prospective/ongoing projects:

- New: solar farm
- Expansion: cheese processing facility
- Ongoing: Riverfront development
- Riverfront redevelopment, including brownfield assessment and cleanup
- Ongoing negotiations with a developer for a multi-family residential building

### Other features or concerns:

- Enterprise zone
- TIF district
- Access to interstate
- Multiple years of disinvestment in one of the historically oldest portions of Dixon

## Amboy Profile



Tracts: Lee 8

Closest municipality: Amboy

County: Lee

Dataset used: 2016 ACS

Poverty qualified: No

Median household income qualified: Yes (8)

Contiguous qualified: n/a

\*Note: tract 1 described elsewhere

### Eligibility calculation:

- Lee 8, in the alternate 2016 ACS dataset, had household income of \$48,188 or 79.05% of statewide median.

### Prospective/ongoing projects:

- Commercial district expansion
- Downtown redevelopment, including grocery store expansion
- Recent manufacturing expansion at food flavoring company

### Other features or concerns:

- Enterprise zone