

VILLAGE OF BARTLETT
VILLAGE HALL, 228 S. MAIN STREET
COMMITTEE AGENDA
February 20, 2024
7:00 P.M.

1. **CALL TO ORDER**
2. **ROLL CALL**
3. **TOWN HALL:** (Note: Three (3) minute time limit per person)
4. **STANDING COMMITTEE REPORTS:**
 - A. **BUILDING AND ZONING COMMITTEE, CHAIRMAN GUNSTEEN**
 1. Alan Horticulture
 - B. **COMMUNITY AND ECONOMIC DEVELOPMENT COMMITTEE, CHAIRMAN GANDSEY**
 1. Branding Concept Discussion
 - C. **FINANCE COMMITTEE, CHAIRMAN LAPORTE**
 1. Water/Sewer Rate Review
 2. Proposed Operating Budget Review Presentation
5. **ADJOURNMENT**



Agenda Item Executive Summary

AGENDA ITEM: #2023-11 Alan Horticulture BOARD OR COMMITTEE: Committee

BUDGET IMPACT

Amount \$N/A Budgeted \$N/A

Fund: N/A Corresponding Activity Measures: P&Z Commission Review

EXECUTIVE SUMMARY

The petitioner is requesting to amend the Blue Heron Business Park annexation agreement and Planned Development to redesignate the property at the northeast corner of Miles Parkway and West Bartlett Road to Development Area 1 to allow the construction of a building and contractor yard for a landscape contractor - Alan Horticulture. The original Blue Heron Business Park annexation agreement and PUD established four development areas each with different bulk regulations and allowable use lists.

The Site Plan includes a 15,600 sq.ft. building for Alan Horticulture's offices and repair facility for their vehicle fleet. The 25' tall pre-cast building includes a canopy on the south and west sides of the building. A combination of real and faux windows are proposed on the 1st and 2nd story on all four elevations. The building and fenced contractor's yard are accessed via two curbcuts on Miles Parkway, there is no direct access to West Bartlett Road.

The Planning and Zoning Commission held the required public hearing, reviewed the petitioner's request, and recommended approval at their meeting on February 1, 2024, with the following additional condition:

- I. the light poles in the employee parking lot shall match that of those in the West Bartlett Corridor Plan.

ATTACHMENTS (PLEASE LIST)

PDS Memo, cover letter, minutes of the Planning & Zoning Commission meeting, application, location map, current PUD Plan, Proposed PUD Plan, site plan, landscape plan, elevations, and West Bartlett Road Design Guidelines

RELATIONSHIP TO STRATEGIC PLAN GOAL

Strategic Plan Goal: Work to improve business profile in the village (Route 25 corridor)

Short Term (1-3 Years): Routine Complex

Long Term (3-5 Years): Routine Complex

ACTION REQUESTED

- For Discussion Only - To review and forward to the Village Board to hold the public hearing on the annexation agreement and for a final vote
- Resolution
- Ordinance
- Motion

Staff: Kristy Stone, PDS Director

Date: February 13, 2024

PLANNING & DEVELOPMENT SERVICES MEMORANDUM

24-11

DATE: February 12, 2024
TO: Paula Schumacher, Village Administrator
FROM: Andrew Barna, Associate Planner *AB*
RE: **(#23-11) Alan Horticulture**

PETITIONER

Abbott Land and Investment Corporation

SUBJECT SITE

NEC Miles Parkway and West Bartlett Road

REQUESTS

**Amendment to the Planned Unit Development (Blue Heron Business Park)
Site Plan (Alan Horticulture)**

SURROUNDING LAND USES

	<u>Land Use</u>	<u>Comprehensive Plan</u>	<u>Zoning</u>
Subject Site	Vacant	Industrial	I-2 EDA
North	Office/Warehouse	Industrial	PD
South	Single Family Residential	Residential	SR-4 PUD
East	Heron Woods Habitat Area	Open Space	N/A
West	Vacant	Commercial	PD

CURRENT DISCUSSION

1. The petitioner is requesting an amendment to the agreement and to modify the Concept Plan and Preliminary PUD Plan for Blue Heron Business Park to change the development area designation for the subject property. The original Blue Heron Business Park annexation agreement and PUD established four development areas each with different bulk regulations and allowable use lists. *The Village Board will conduct the public hearing and review the petitioner's request to amend the annexation agreement.*
2. The subject property is currently designated as being within Development Area

- 4, which is restricted to commercial uses. The petitioner is requesting that the property designation be changed to Development Area 1 to allow a contractor's yard with outdoor storage for Alan Horticulture.
3. The **Site Plan** includes a 16,590 square foot building an office area with second floor mezzanine and a 11,600 sq.ft. maintenance area for their fleet.
4. The parking lot contains forty-nine (49) parking spaces for office and warehouse employees and visitors, which meets zoning ordinance requirements.
5. The gravel storage yard includes eighty-three (83) truck and trailer parking spaces. Thirty-five of the stalls are double stacked for landscape equipment staging. The south side of the storage yard contains a fueling station surrounded by bollards with four (4) pumps and tanks. To the east, a masonry dumpster enclosure is included. The north side of the yard includes six (6) concrete, material landscape bin blocks to hold gravel, sand, mulch, and dirt. The northernmost portion of the yard has four (4) concrete block landscape bins with fabric roof structures. These bins would provide covered salt storage in the winter and equipment storage in the summer. Additionally, the yard contains a dumpster for yard waste grass clippings, a landscape debris bin block, and a nursery stack covered with a fabric roof.
6. The 25' tall pre-cast building includes a canopy on the south and west sides of the building. A combination of real and faux windows are proposed on the 1st and 2nd story on all four elevations. The north side of the building has five (5) drive-in dock doors. The south side of the building (facing West Bartlett Road) has one (1) drive-in dock door. *The West Bartlett Road Corridor Plan identifies this property as being in the Picturesque Western Gateway. This design guidelines in the Corridor Plan propose office buildings to be located near to the landscape buffer along West Bartlett Road and that building materials should combine a mixture of materials. The design guidelines for the West Bartlett Road Corridor Plan are attached.*
7. The site will be accessed via two (2) curb cuts on Miles Parkway. The southern curb cut to service the employee and visitor parking lot and the northern curb cut serves the truck and trailer parking and dock doors of the repair facility.
8. The updated landscape plan, elevation plan, photometric plan and engineering plans are currently under review by Staff.

RECOMMENDATION

1. The Staff recommends **approval** of the petitioner's requests for an amendment of the PUD and the Site Plan subject to the following conditions and findings of fact:
 - A. Village Engineer approval of the engineering plans;
 - B. Building permits shall be required for all construction activities;

- C. Planning and Development Services approval of the landscape and photometric plan;
- D. Landscaping must be installed within one year of the issuance of a building permit;
- E. If landscaping cannot be installed at the time of construction, a landscape estimate shall be submitted to the Planning & Development Services department for review and approval by the Village Forester and a bond posted in the approved amount for its future installation;
- F. All proposed signage shall require permits and approval from the Planning & Development Services Department prior to installation;
- G. Dumpsters shall be located behind a solid gate;
- H. Any required Public Improvement Completion Agreement and associated bonds shall be submitted for review and approval by the Village Attorney;
- I. The emissions of odorous matter in such quantity as to be readily detectable at any point along a lot line or as to produce a public nuisance or hazard beyond a lot line is prohibited.
- J. Findings of Fact (PUD):
 - i. That The proposed Planned Unit Development is desirable to provide a mix of uses which are in the interest of public convenience and will contribute to the general welfare of the community;
 - ii. That the Planned Unit Development will not under the circumstances of the particular case be detrimental to the health, safety, morals, or general welfare of persons residing or working in the vicinity or be injurious to property value or improvement in the vicinity;
 - iii. That the Planned Unit Development shall conform to the regulations and conditions specified in this title for such use and with the stipulations and conditions made a part of the authorization granted by the Village Board of Trustees.
 - iv. That the proposed uses conform to the Comprehensive Plan and the general planning policies of the Village for this parcel.
 - v. That each of the proposed uses is a permitted or special use in the district or districts in which the Planned Unit Development would be located.
 - vi. That the Planned Unit Development is designed, located and proposed to be operated and maintained so that the public health, safety and welfare will not be endangered or detrimentally affected.
 - vii. That it shall not substantially lessen or impede the suitability for permitted use and development of, or be injurious to the use and enjoyment of, or substantially diminish or impair the value of, or be incompatible with, other property in the immediate vicinity.
 - viii. That impact donations shall be paid to the Village in accordance with all applicable Village ordinances in effect at the time of approval.
 - ix. That the plans provide adequate utilities, drainage and other necessary facilities.
 - x. That The plans provide adequate parking and ingress and egress and are so designed as to minimize traffic congestion and hazards in the public streets.

- xi. That the plans have adequate site area, which area may be greater than the minimum in the district in which the proposed site is located, and other buffering features to protect uses within the development and on surrounding properties.
 - xii. That there is reasonable assurance that, if authorized, the PUD will be completed according to schedule and adequately maintained.
- K. Findings of Fact (Site Plan):
- i. That the proposed contractor yard on the Subject Property is a permitted use in Development Area 1 of the Blue Heron Business Park PD Zoning District;
 - ii. That the proposed development on the Subject Property and the proposed improvements, off-street parking, access, lighting, landscaping, and drainage is compatible with adjacent land uses;
 - iii. That the vehicular ingress and egress to and from the site and circulation within the site provides for safe, efficient, and convenient movement of traffic not only within the site but on adjacent roadways as well;
 - iv. That the site plan provides for the safe movement of pedestrians within the site;
 - v. That there is a sufficient mixture of grass, trees, and shrubs within the interior and perimeter (including public right-of-way) of the site so that the proposed development will be in harmony with adjacent land uses. Any part of the site plan area not used for buildings, structures, parking, or access ways shall be landscaped with a mixture of grass, trees, and shrubs.
 - vi. That all outdoor storage areas are screened and are in accordance with standards specified by this Ordinance.
2. The Planning and Zoning Commission held the required public hearing, reviewed the petitioner's request, and **recommended approval** at their meeting on February 1, 2024, with the following additional condition:
- a. the light poles in the employee parking lot shall match that of those in the West Bartlett Corridor Plan.
3. The revised site plan, minutes of the P&Z Commission meeting, and additional background information is attached for your review.

ab/attachments

General - PDS Team\memos 2024\011_AlanHorticulture_vbc.docx



Village of Bartlett
Planning and Zoning Commission
February 1, 2024

(#23-11) Alan Horticulture, LLC

Amendment to the Planned Unit Development (Blue Heron Business Park)

Site Plan (Alan Horticulture)

PUBLIC HEARING

The following exhibits were presented:

Exhibit A – Picture of Sign

Exhibit B – Mail Affidavit

Exhibit C – Notification of Publication

A. Barna stated that Alan Horticulture submitted a concept plan that was reviewed by the Committee of the Whole on September 19, 2023 and have now submitted a full development application for this project. The site for the proposed contractor's yard with outdoor storage is 5.93 acres at the northeast corner of W. Bartlett Road and Miles Parkway in the Blue Heron Business Park. Blue Heron Business Park was annexed in 2003 and as part of the development agreement the property was divided into 4 development areas. Each development area has its own set of permitted uses. The properties along W. Bartlett Road are designated for commercial use only. The petitioner is requesting an amendment to the Planned Unit Development. The subject property is currently designated as Development Area 4, which is restricted to commercial uses. An amendment to the PUD would change the scope of development of area 1 to an industrial development area that extends south to W. Bartlett Road. The site on the south side would be for employee parking, a facility with repair for the fleet and office space with an access points on Miles Parkway, a southern access point for employee parking and the northern access point for landscape trucks and trailers. Additionally, to the north, there are bins for landscaping material, salt storage in the winter and equipment storage in the summer. For the elevations, the 25' tall pre-cast building includes a combination of real and faux windows on all 4 elevations. The north side of the building has 5 drive-in dock doors. The south side has 1 drive-in dock door. The landscaping plan shows the existing berm along W. Bartlett Road with all additional required plantings, as well as the prairie buffer seeding on the east side for the IDNR property. Staff recommends approval of the petitioner's requests for an amendment of the PUD and the Site Plan subject to the findings of fact with one condition relating to lighting for the light poles in the employee parking lot to match those in the W. Bartlett Corridor Plan on the south side along W. Bartlett Road. The petitioner has already agreed to this condition. **M. Werden** what types of planting will be added? **A. Barna** there are a number of evergreen trees which already exist. Deciduous shrubs, evergreen shrubs and shade trees will be added. The prairie buffer seeding would be along the east side of the property. The petitioner is also present to answer questions. The petitioners, **Dean Kelley**, Abbott Land and Investment Corp., 2250 Southwind Blvd, Bartlett, IL, **Charles Smith**, Arete Design Studio Ltd., 13543 185th St, Mokena, IL and **Daniel Huber**, Alan Horticulture, 4355 Weaver Pkwy #350, Warrenville, IL came forward and were sworn in by **M. Werden**. **J. Battermann** asked, what type of gas storage is planned? **A. Barna** the gas storage includes 4 above-ground pumps and tanks for the fleet. **J. Battermann** I do appreciate that the building looks commercial in the front and that there are awnings to make the building look more commercial than industrial. That is very nice. What is the intent of the south-facing side of the building that is facing part of the residential area across the street and what are the intentions for



Village of Bartlett
Planning and Zoning Commission
February 1, 2024

the parking? **D. Huber** stated that the parking lot will be used for the employees only. Very seldom do we have clients there. **J. Battermann** will the passthrough garage stay open? **D. Huber** the overhead door that faces south will primarily stay closed. The purpose of that door is to have a passthrough. **J. Battermann** what will the mezzanine be used for and will that mezzanine be staffed full-time with a receptionist? **D. Huber** the mezzanine is a small area that our supervisors will be using daily, but the majority of our offices are on the first floor. **C. Deveaux** I believe there is an eagle's nest where you are going to build. Has the IDNR had any discussion about that? **K. Stone** IDNR has completed their survey of the property and they did not think there would be any impact. **M. Werden** asked, what do the faux windows look like? **C. Smith** stated that the faux windows will create an architectural façade. Those windows will match the color of the building and the inside of the windows will be painted gray to match the color of the other windows in the daylight. **M. Werden** I do like that for curb appeal. **M. Hopkins** asked, how will the roof top mechanicals be screened? **K. Stone** stated, in the Building Code, Section 9-11-3 we require that all rooftop mechanical units be screened on all sides. That is a building code requirement that is enforced by our Building Division Manager. **J. Battermann** the section of Miles Parkway near Kenyon is used by a lot of high school students at about 7:30 in the morning. Are there going to be large trucks in that area around that time? **D. Huber** the trucks are usually out by 7 am.

M. Werden opened the public hearing. No one from the public came forward.

M. Hopkins made a motion to pass along **a positive recommendation** to the Village Board to approve case (#23-11) **Alan Horticulture** to Amendment to the Planned Unit Development (Blue Heron Business Park) and for a Site Plan subject to the conditions and findings of fact outlined in the staff report.

Motioned by: M. Hopkins

Seconded by: J. Miaso

M. Werden closed the public hearing portion of the meeting.

Roll Call

Ayes: C. Deveaux, M. Hopkins, J. Kapadoukakis, G. Koziol, J. Miaso, J. Battermann, M. Werden

Nays: None

The motion carried.



ABBOTT LAND AND INVESTMENT CORP.
Commercial and Industrial Real Estate

January 19, 2024

RECEIVED
PLANNING & DEVELOPMENT

JAN 19 2024

VILLAGE OF
BARTLETT

Sent via Email and Hand Delivery

Village Board of Trustees
c/o Kristy Stone, Planning & Development Services Director
Village of Bartlett
228 Main St.
Bartlett, IL 60103

RE: 5.93 Acres at NEC West Bartlett Road and Miles Parkway in Blue Heron Business Park

Dear Village Board of Trustees,

As it relates to the application for an Amendment to the Annexation Agreement, PUD, Site Plan Approval for the subject property, and our previously submitted items on December 13, 2023, enclosed are the following updated plans in response to the Zoning and Plan Review No. 1 dated 12/28/2023 prepared by Andrew Barna:

1. Updated Site Plan and updated Floor Plan dated 1/18/2024 by Arete Design Studio that addresses comments 1 – 13 as outlined in the Zoning/Planning Review.
2. Updated Landscape Plan prepared by Blue Stem Design, Inc. dated 1/18/2024 that addressed Zoning/Planning Review comments 14 – 25.
3. Updated Elevation Plan (black and white and colored rendering) by Arete Design Studio dated 1/18/2024 that addresses comments 27 and 28. Please note that item 26, the West Bartlett Road Corridor Plan in reference to the attractive features and building materials, has been addressed based on feedback from Village staff and the Village Board. Those materials are shown on the colored building elevations.
4. Updated Lighting Plan prepared by KSA Lighting and Controls that shows the property lines (comment 29) on the Lighting Plan and also confirms lighting will not exceed 1.0-foot candle at the property line for non-residential and 0.2-foot candle for residential.
5. With respect to comment 31, we will provide an agreement with a neighbor to the west allowing the applicant to tie into the existing fence. If that is not obtained, then we will construct a parallel fence as shown on the plans.
6. Attached is a letter from Alan Horticulture detailing employee count (comment 32).
7. Attached is a letter from Alan Horticulture regarding vehicle maintenance only performed on vehicles owned by the company (comment 33).

8. Attached is a letter from Alan Horticulture outlining the frequency that yard waste is picked up (comment 34).
9. Attached are revised Engineering Plans prepared by Mackie Consultants, LLC. In response to Public Works comments dated 1/3/2024, the Stormwater Report (comment 1) was submitted previously. General comments 2 and 3 are noted and will be addressed at the appropriate time for permitting.
10. For comment 4, there is no wastewater pre-treatment requirement for this use.
11. For Engineering Comments 5 – 10, the watermain has been revised along with hydrant locations and quantity based on the engineering review comments, and the depressed curb replaced with barrier curb and gutter (#10).
12. The fueling station will be permitted by the Bendor through the State of Illinois Fire Marshal (comment 11).
13. The self-storage area will be covered and enclosed in a concrete structure (comment 12).
14. MH11 picks up drainage from a pipe stub unfinished by TCP to the north. The manhole (MH) allows TCP access for maintenance, but none of the applicant's pavement or structures drain to it (comment 13).
15. The plans comply with the DuPage Storm Ordinance.
16. Based on South Elgin & Countryside Fire Protection District's comments of 1/3/2024, Mackie conducted an Auto-turn analysis that ensures a fire truck can navigate around the building.

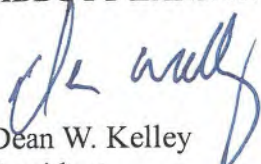
Each of the revised plans has been sent via email and hard copy in 11" x 17" format

Please let me know if you require additional information.

Thank you for your consideration.

Sincerely,

ABBOTT LAND AND DEVELOPMENT CORPORATION


Dean W. Kelley
President

Enclosures



VILLAGE OF BARTLETT DEVELOPMENT APPLICATION

For Office Use Only
Case # _____
RECEIVED
PLANNING & DEVELOPMENT
DECEMBER 13 2023
VILLAGE OF
BARTLETT

PROJECT NAME Alan Horticulture

PETITIONER INFORMATION (PRIMARY CONTACT)

Name: Dean W. Kelley

Street Address: 2250 Southwind Blvd.

City, State: Bartlett, IL 60103

Zip Code: 60103

Email Address: _____

Phone Number: _____

Preferred Method to be contacted: Email

PROPERTY OWNER INFORMATION

Name: Gifford 300, LLC

Street Address: _____

City, State: _____

Zip Code: _____

Phone Number: _____

OWNER'S SIGNATURE: [Signature]

Date: 13 DEC 2023

(OWNER'S SIGNATURE IS REQUIRED or A LETTER AUTHORIZING THE PETITION SUBMITTAL.)

ACTION REQUESTED (Please check all that apply)

- Annexation (Amendment) Text Amendment
- PUD (preliminary) Rezoning _____ to _____
- PUD (final) Special Use for: _____
- Subdivision (preliminary) Variation: _____
- Subdivision (final)
- Site Plan (please describe use: commercial, industrial, square footage): 15,600 SF industrial with outside storage
- Unified Business Center Sign Plan
- Other (please describe) _____

SIGN PLAN REQUIRED? Yes or No

(Note: A Unified Business Center Sign Plan is required for four or more individual offices or businesses sharing a common building entrance or private parking lot.)

PROPERTY INFORMATION

Common Address/General Location of Property: NEC Miles Parkway and West Bartlett Road

Property Index Number ("Tax PIN"/"Parcel ID"): 06-36-200-036-0000

Zoning: Existing: PD
(Refer to Official Zoning Map)

Land Use: Existing: Vacant

Proposed: PD

Proposed: Industrial

Comprehensive Plan Designation for this Property: Mixed use Business Park
(Refer to Future Land Use Map)

Acreage: 5.93

1/2 Industrial; 1/2 Commercial

For PUD's and Subdivisions:

No. of Lots/Units: _____

Minimum Lot: Area _____ Width _____ Depth _____

Average Lot: Area _____ Width _____ Depth _____

APPLICANT'S EXPERTS (If applicable, including name, address, phone and email)

Attorney Guerard & Krasner, LLC - Richard M. Guerard
310 S. County Farm Road, Suite H, Wheaton, IL 60187-2409
Phone: 630-698-4700; Email: rich@wydp.com

Engineer Mackie Consultants, LLC - Steven Kaminski
9575 W. Higgins Road, Suite 500, Rosemont, IL 60018
Phone: 847-696-1400; Email: skaminski@mackieconsult.com

Other / Architect Arete Design Studio Ltd. - Charles E. Smith, Jr.
13543 185th Street, Mokena, IL 60448
Office: 815-485-7333; Cell: 815-980-0670; Email: csmith@arete-ltd.com

FINDINGS OF FACT (Standards)

The Village of Bartlett Zoning Ordinance requires that certain findings of fact, or standards, must be met before a special use permit, variation, site plan or planned unit development may be granted. Each application for a hearing before the Planning & Zoning Commission for a special use, variation, site plan or planned unit development must address the required findings of fact for each particular request. The petitioner should be aware that he or she must present specific testimony at the hearing with regards to the findings. **(On the following pages are the findings of fact, or standards, to be met. Please respond to each standard, in writing, as it relates to the case.)**

****PLEASE FILL OUT THE FOLLOWING FINDINGS OF FACT AS THEY RELATE TO YOUR PETITION****

Findings of Fact for **Site Plans**: Pages 4-5

Findings of Fact for **Planned Unit Developments**: Pages 6-9

Findings of Fact for **Special Uses**: Page 10

Findings of Fact for **Variations**: Pages 11-12

FINDINGS OF FACT FOR SITE PLANS

Both the Planning & Zoning Commission and Village Board must decide if the requested Site Plan meets the standards established by the Village of Bartlett Zoning Ordinance. The Planning & Zoning Commission shall make findings based upon evidence presented on the following standards:

(Please respond to each of these standards in writing below as it relates to your case. It is important that you write legibly or type your responses as this application will be included with the staff report for the Planning & Zoning Commission and Village Board to review.)

1. The proposed use is a permitted use in the district in which the property is located.

We are seeking an amendment to the Annexation Agreement as well as the Concept Plan and PUD Plan associated with that Annexation Agreement. The proposed industrial use with outside storage is permitted within Development Area 1, which encompasses approximately fifty (50) percent of the northerly portion of the 5.93-acres. The southerly approximately fifty (50) percent is within Development Area 4, which is designated as commercial. Once the PUD Plan is amended, the proposed use will be permitted within Development Area 1 of the PUD District.

2. The proposed arrangement of buildings, off-street parking, access, lighting, landscaping, and drainage is compatible with adjacent land uses.

A proposed building is at the southern end of the property and fronts West Bartlett Road. There is no off-street parking and all access, lighting, landscaping, and drainage is compatible with adjacent land uses and meets Bartlett's code.

3. The vehicular ingress and egress to and from the site and circulation within the site provides for safe, efficient and convenient movement of traffic not only within the site but on adjacent roadways as well.

There are two main access points to the site; the southerly one primarily for vehicular traffic and the northerly entrance point to service the storage yard.

4. The site plan provides for the safe movement of pedestrians within the site.

here would be very few pedestrians within the site as the building serves primarily the employees and other workers. There are sidewalks near the entrances of the building

5. There is sufficient mixture of grass, trees and shrubs within the interior and perimeter (including public right-of-way) of the site so that the proposed development will be in harmony with adjacent land uses and will provide a pleasing appearance to the public. Any part of the site plan area not used for buildings, structures, parking or accessways shall be landscaped with a mixture of grass, trees and shrubs. (All landscape improvements shall be in compliance with Chapter 10-11A, Landscape Requirements)

All landscaping improvements will meet the Village of Bartlett's code requirements and are in substantial compliance with the West Bartlett Road Corridor Plan.

6. All outdoor storage areas are screened and are in accordance with standards specified by this Ordinance.

All outside storage areas are screened by landscaping and fencing and are also screened by the building to the south, the state park property to the east, and the Traffic Control & Protection building and storage yard to the north.

FINDINGS OF FACT FOR PLANNED UNIT DEVELOPMENTS

Both the Planning & Zoning Commission and Village Board must decide if the requested Planned Unit Development meets the standards established by the Village of Bartlett Zoning Ordinance. The Planning & Zoning Commission shall make findings based upon evidence presented on the following standards:

(Please respond to each of these standards in writing below as it relates to your case. It is important that you write legibly or type your responses as this application will be included with the staff report for the Planning & Zoning Commission and Village Board to review.)

1. The proposed Planned Unit Development is desirable to provide a mix of uses which are in the interest of public convenience and will contribute to the general welfare of the community.

The proposed Planned Unit Development amendment provides for the entire 5.93-acres to be designated as Development Area 1, which allows for industrial uses and outside storage. This is consistent with the other uses in Blue Heron Business Park, and in particular, the uses east of Miles Parkway where outside storage is a permitted use.

2. The Planned Unit Development will not under the circumstances of the particular case be detrimental to the health, safety, morals, or general welfare of persons residing or working in the vicinity or be injurious to property value or improvement in the vicinity.

The Planned Unit Development is within the Blue Heron Business Park and will not have a negative impact on nearby property owners to the south and east. There is sufficient distance and screening between the uses to act as a buffer.

3. The Planned Unit Development shall conform to the regulations and conditions specified in the Title for such use and with the stipulation and conditions made a part of the authorization granted by the Village Board of Trustees.

The Planned Unit Development substantially conforms with the regulations and conditions for the uses within the Blue Heron Business Park.

4. The proposed uses conform to the Comprehensive Plan and the general planning policies of the Village for this parcel.

The proposed uses conform to the Comprehensive Plan and the amendment to the Planned Unit Development will allow the Blue Heron Business Park to remain primarily an industrial park.

5. Each of the proposed uses is a permitted or special use in the district or districts in which the Planned Unit Development would be located.

The proposed use is a permitted use within the Planned Unit Development district.

6. The Planned Unit Development is designed, located and proposed to be operated and maintained so that the public health, safety and welfare will not be endangered or detrimentally affected.

The Planned Unit Development that encompasses this Development Area within the Blue Heron Business Park is consistent with the remaining uses within the Blue Heron Business Park and will not impact the public health, safety and welfare of nearby residents or others.

7. It shall not substantially lessen or impede the suitability for permitted use and development of, or be injurious to the use and enjoyment of, or substantially diminish or impair the value of, or be incompatible with, other property in the immediate vicinity.

The property is within a business and will not be detrimental, injurious, or otherwise diminish or impair the value of the other adjoining properties within the business park.

8. Impact donations shall be paid to the Village in accordance with all applicable Village ordinances in effect at the time of approval.

The petitioner or user will pay all applicable impact donations and other fees as required by the Village of Bartlett.

9. The plans provide adequate utilities, drainage and other necessary facilities.

The plans are designed by Mackie Consultants, LLC, which is very familiar with the Blue Heron Business Park. All plans will provide adequate utilities, drainage, and other necessary facilities.

10. The plans provide adequate parking and ingress and egress and are so designed as to minimize traffic congestion and hazards in the public streets.

The plans provide adequate parking for employees and visitors and the two ingress and egress points provide for an efficient flow of traffic and separation between the yard and office and warehouse activities.

11. The plans have adequate site area, which area may be greater than the minimum in the district in which the proposed site is located, and other buffering features to protect uses within the development and on surrounding properties.

The proposed plan has an adequate site area and exceeds the minimum requirements for the district in which it is located. It includes buffering features required by the Village of Bartlett with respect to screening and landscaping.

12. There is reasonable assurance that, if authorized, the PUD will be completed according to schedule and adequately maintained.

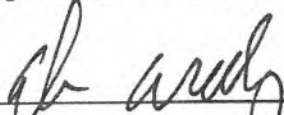
If authorized, this particular use in the Planned Unit Development will be completed in 2024 and will be adequately maintained by its user and owner, which is a landscape company.

ACKNOWLEDGEMENT

I understand that by signing this form, that the property in question may be visited by village staff and Board/Commission members throughout the petition process and that the petitioner listed above will be the primary contact for all correspondence issued by the village.

I certify that the information and exhibits submitted are true and correct to the best of my knowledge and that I am to file this application and act on behalf of the above signatures.

Any late, incomplete or non-conforming application submittal will not be processed until ALL materials and fees have been submitted.

SIGNATURE OF PETITIONER: 

PRINT NAME: Dean W. Kelley

DATE: 12/13/23

REIMBURSEMENT OF CONSULTANT FEES AGREEMENT

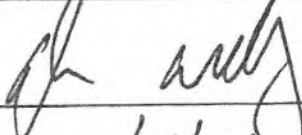
The undersigned hereby acknowledges his/her obligation to reimburse the Village of Bartlett for all necessary and reasonable expenses incurred by the Village for review and processing of the application. Further, the undersigned acknowledges that he/she understands that these expenses will be billed on an ongoing basis as they are incurred and will be due within thirty days. All reviews of the petition will be discontinued if the expenses have not been paid within that period. Such expenses may include, but are not limited to: attorney's fees, engineer fees, public advertising expenses, and recording fees. Please complete the information below and sign.

NAME OF PERSON TO BE BILLED: Dan Huber c/o Dean Kelley

ADDRESS: 2250 Southwind Blvd
Bartlett, IL 60103

PHONE NUMBER: 630-497-9440 Ext. 4

EMAIL: dean@abbottland.com

SIGNATURE: 

DATE: 12/13/23



Zoning/Location Map

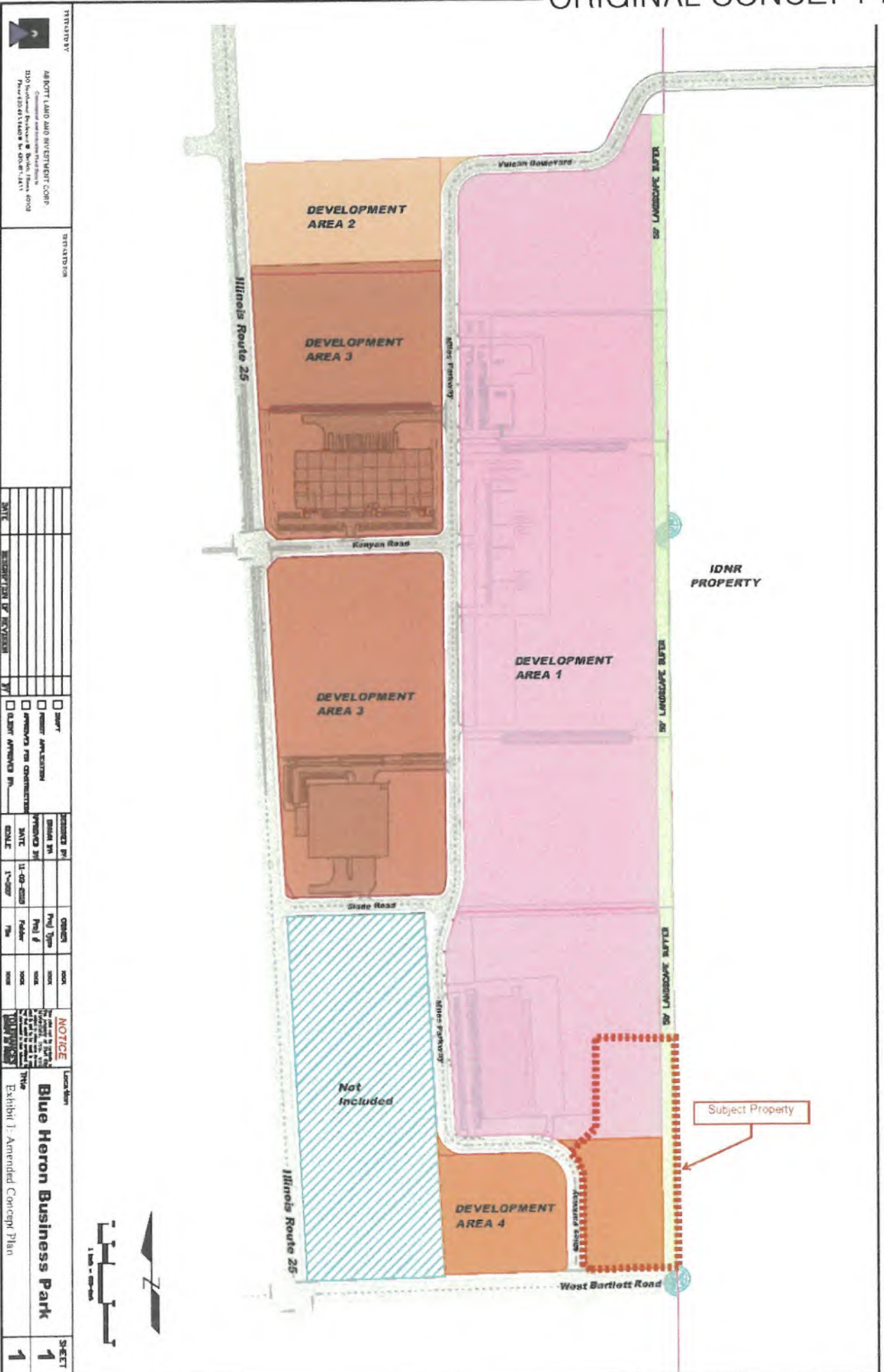
Kane PIN:
0636200036

2024



0 200 400 US Feet

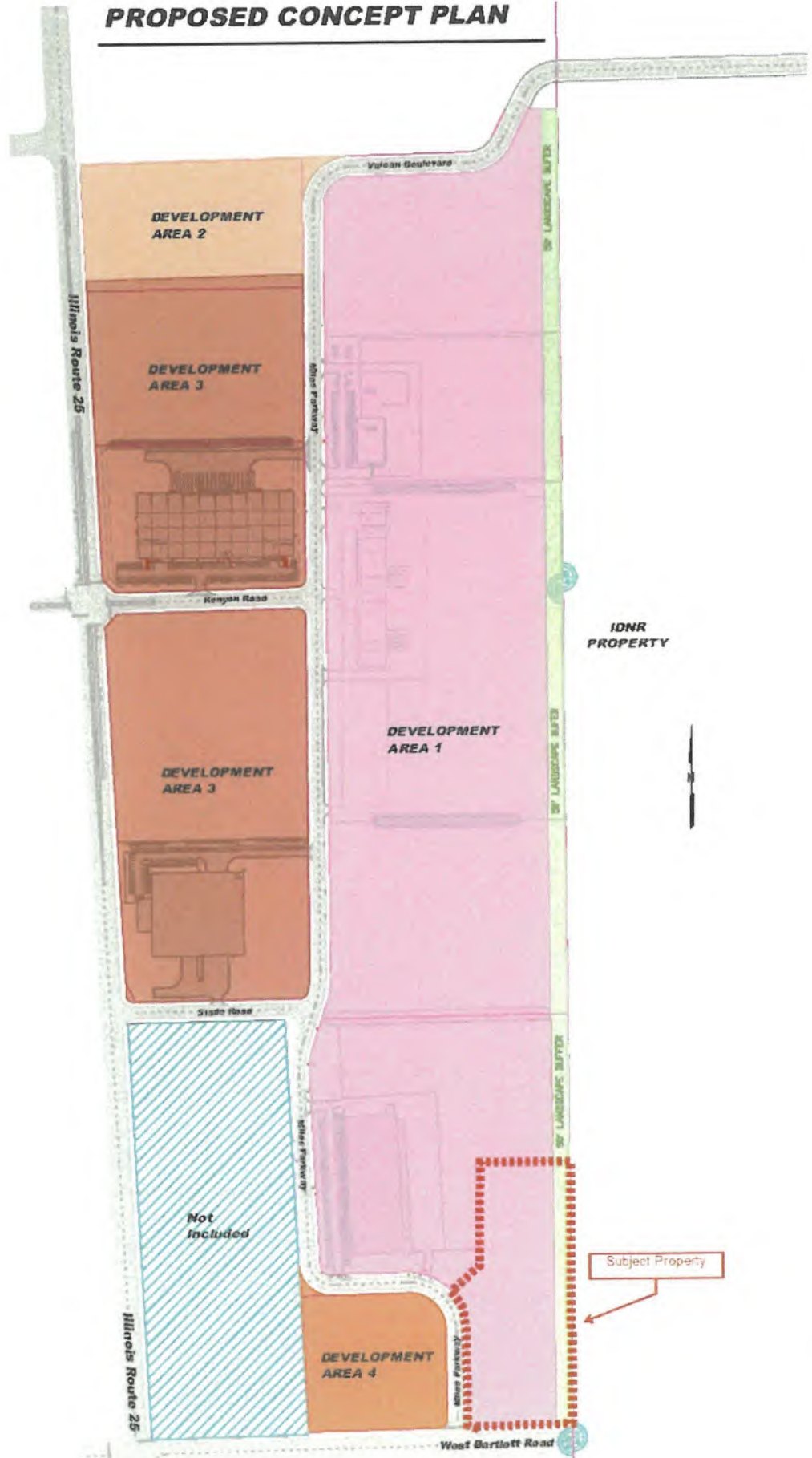
ORIGINAL CONCEPT PLAN

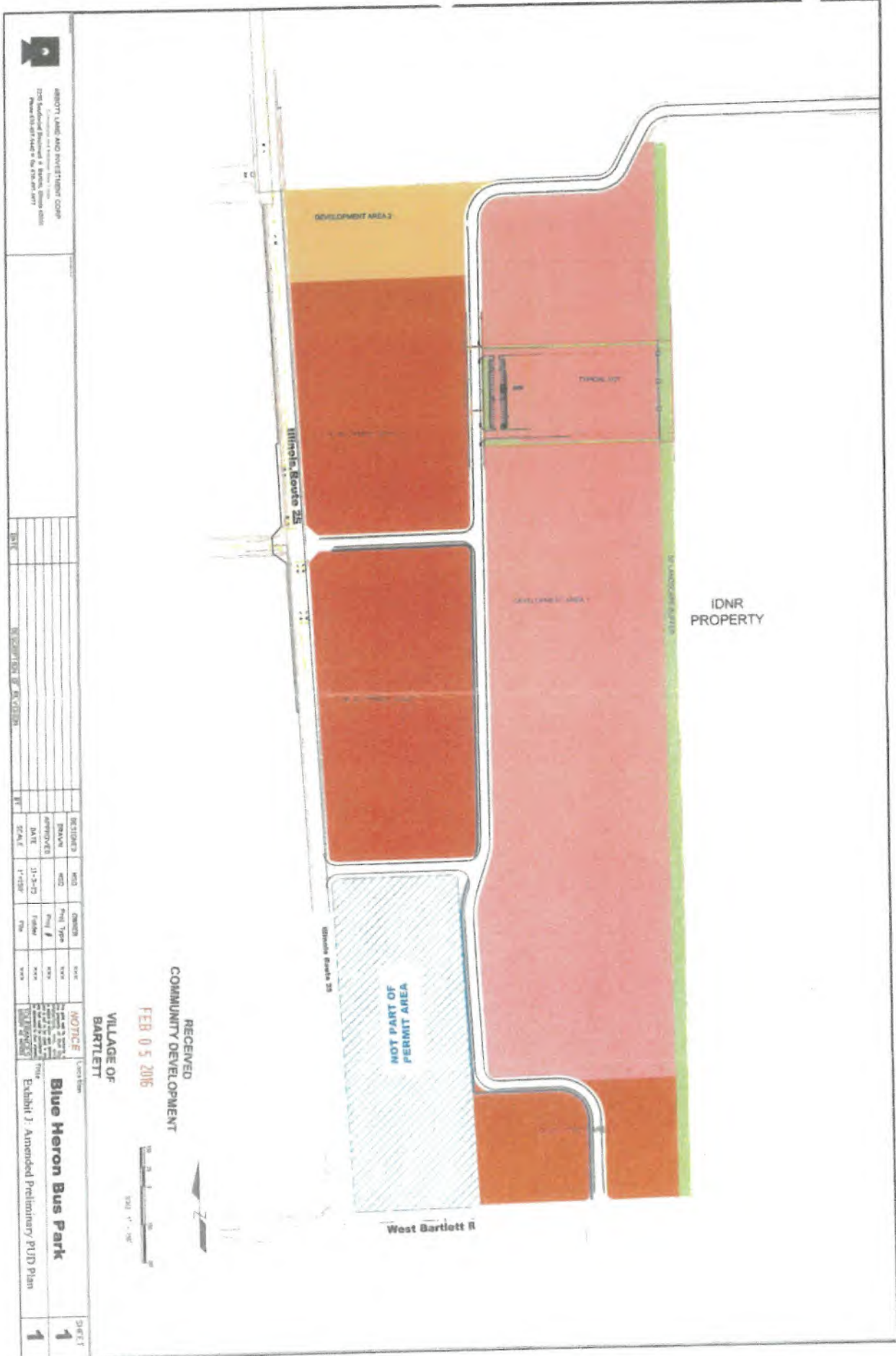


PREPARED BY ARBORE LAND AND INVESTMENT CORP. 330 Business Parkway • Suite 1000 Peoria, IL 61611		DRAWN BY 	
DATE: _____ REVISION: _____ BY: _____		CHECKED BY: _____ DATE: _____ BY: _____	
<input type="checkbox"/> APPROVED FOR CONSTRUCTION <input type="checkbox"/> APPROVED FOR CONSTRUCTION		PROJECT NO.: _____ SHEET NO.: _____	
PROJECT NO.: _____ SHEET NO.: _____		DATE: 11-09-2007 SCALE: 1"=500'	
OWNER: _____ PROJ. TYPE: _____ PROJ. # _____ NO. OF SHEETS: _____ THIS SHEET NO.: _____		NOTICE THIS PLAN IS THE PROPERTY OF ARBORE LAND AND INVESTMENT CORP. AND IS NOT TO BE REPRODUCED OR TRANSMITTED IN ANY FORM OR BY ANY MEANS, ELECTRONIC OR MECHANICAL, INCLUDING PHOTOCOPYING, RECORDING, OR BY ANY INFORMATION STORAGE AND RETRIEVAL SYSTEM, WITHOUT THE WRITTEN PERMISSION OF ARBORE LAND AND INVESTMENT CORP.	
Location: Blue Heron Business Park Exhibit 1: Amended Concept Plan		SHEET 1	



PROPOSED CONCEPT PLAN





ASBOTT, LAND AND INVESTMENT CORP.
 2205 Industrial Boulevard • Lincoln, Illinois 62656
 Phone: 618/997-7400 • Fax: 618/997-8977

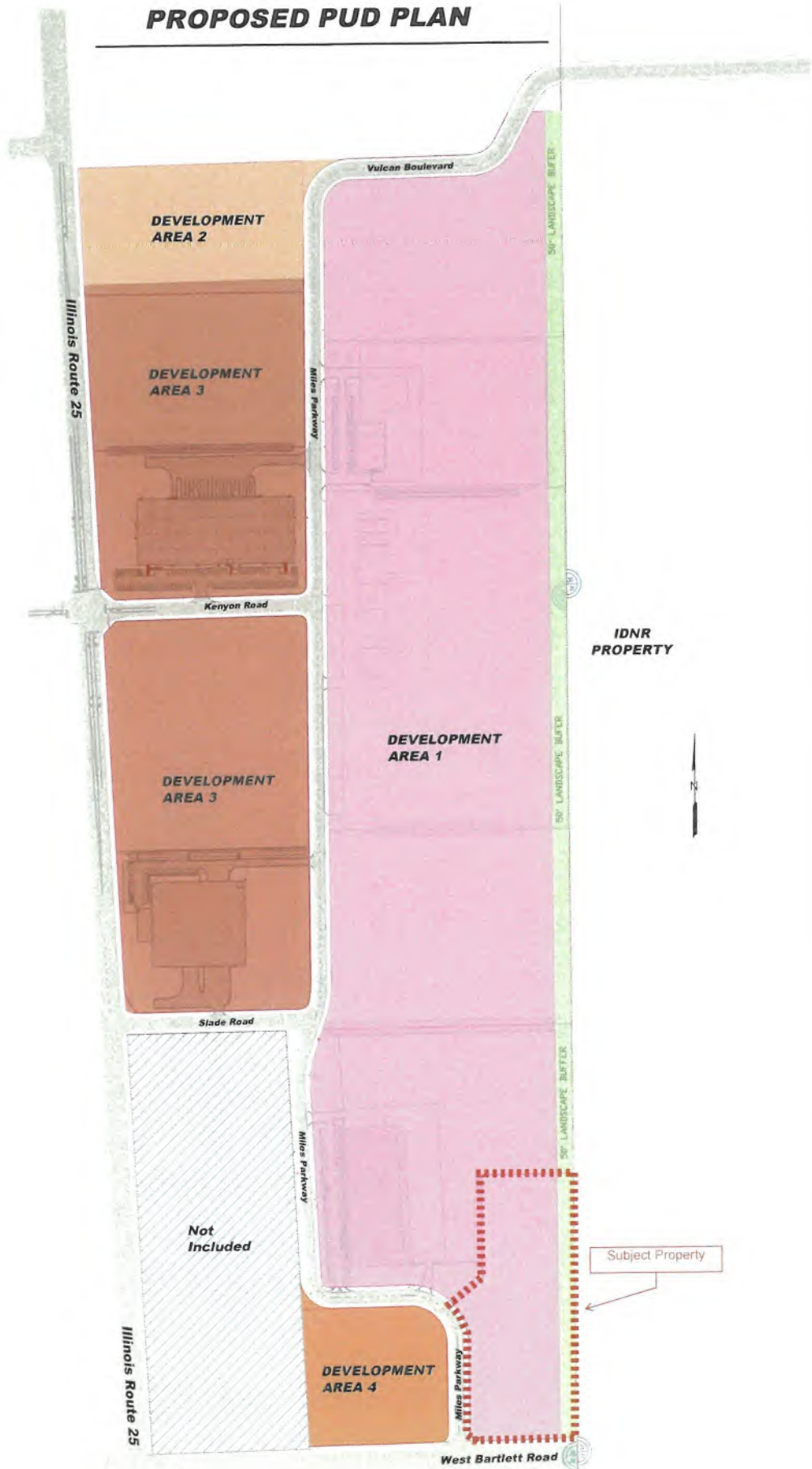
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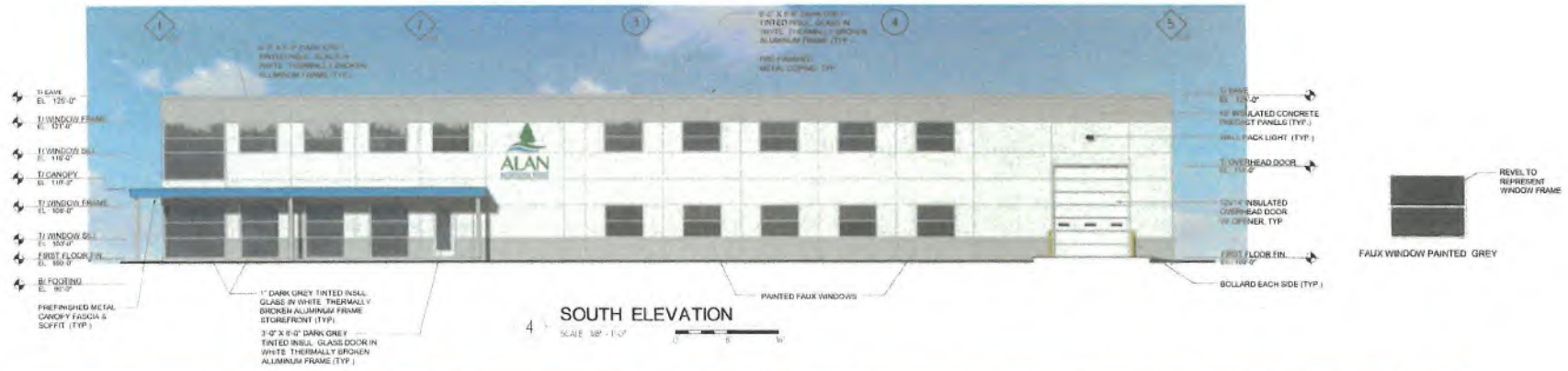
NO.	REVISION	DATE	BY	SCALE

RECEIVED
 COMMUNITY DEVELOPMENT
 FEB 05 2016
 VILLAGE OF
 BARTLETT

Blue Heron Bus Park
 Exhibit 1 Amended Preliminary PUD Plan

PROPOSED PUD PLAN





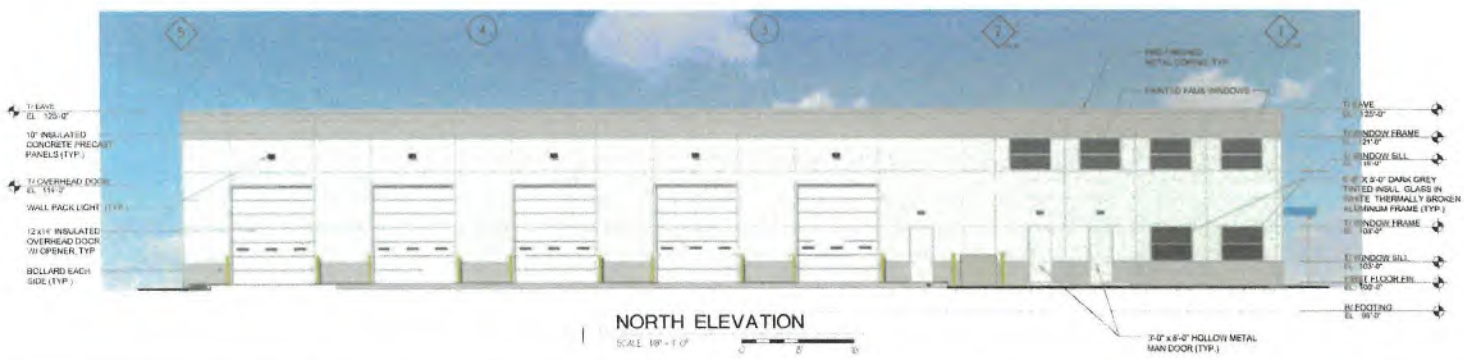
4 SOUTH ELEVATION
SCALE: 1/8" = 1'-0"



3 EAST ELEVATION
SCALE: 1/8" = 1'-0"



2 WEST ELEVATION
SCALE: 1/8" = 1'-0"



1 NORTH ELEVATION
SCALE: 1/8" = 1'-0"

EL-1R

PROJECT #: 23020
DATE: 06/14/2023
REVISIONS: 01/18/2024
SCALE: AS NOTED
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OWNER:
ALAN HORTICULTURE LLC

ALAN HORTICULTURE
4355 WEAVER PKWY, SUITE 350
WARRENVILLE, IL 60555

PROPOSED LANDSCAPE
SERVICE FACILITY

NEC W. BARTLETT RD. & MILES PKWY.
BARTLETT, IL 60103

DESIGN BUILDER:

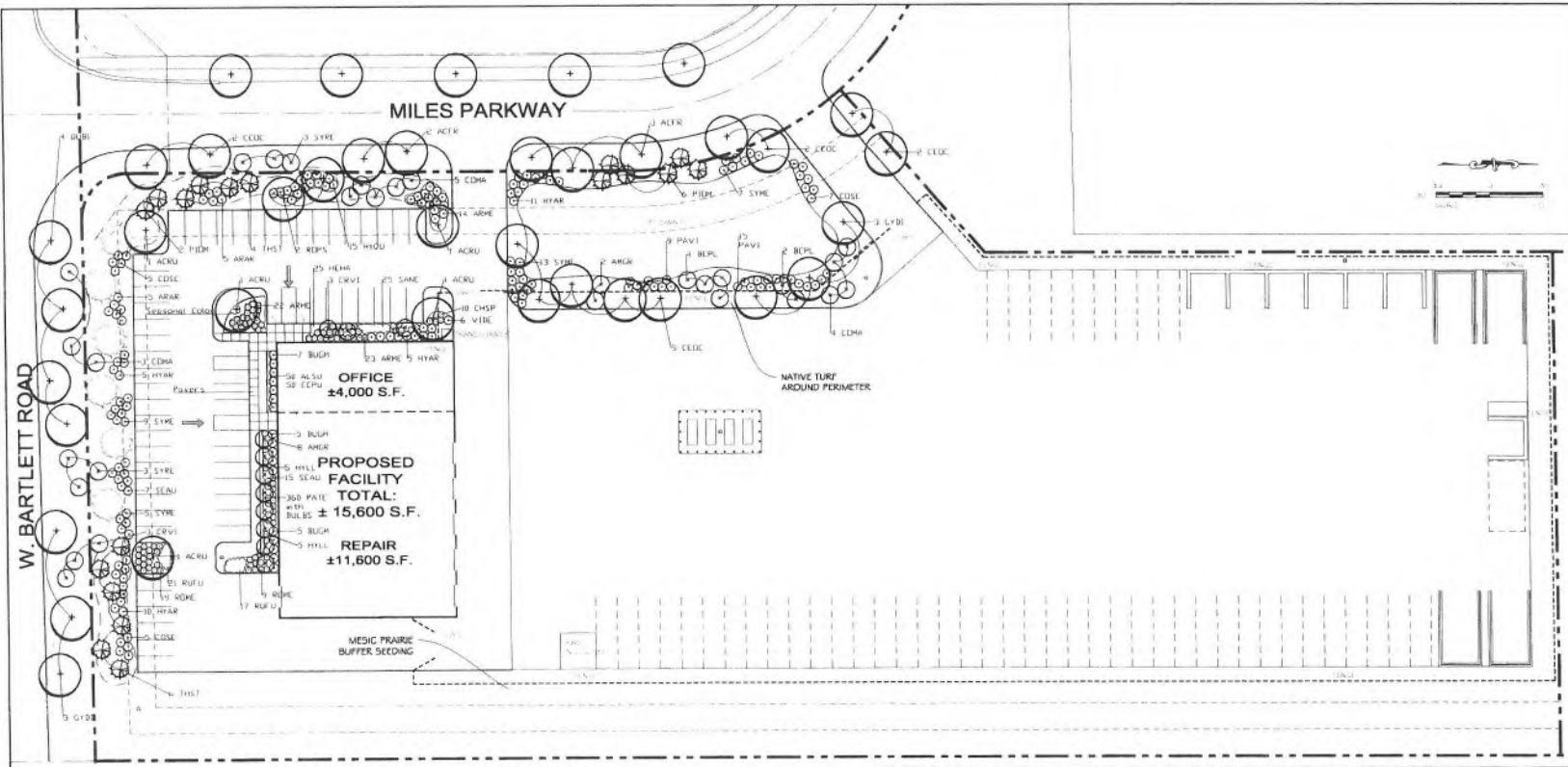


WARNER ENTERPRISES, INC.
10150 SOUTH VIRGINIA AVENUE, SUITE J
CHICAGO RIDGE, IL 60415
(708)423-8200

ARCHITECT/PLANNER:

arete design studio

arete design studio, llc
1044 W. 130TH STREET, SUITE 100
MARIETTA, GA 30067
770.444.1710



Alan Horticulture

Barlett, Illinois

Alan Horticulture

4355 Weaver Parkway
Warrenville, Illinois 60555

Plant Schedule

QTY	SYM	SUBSTR. MARK	COMMON NAME	REF. JES. MARK	EQTY	PLANT	PLANT	QTY	SYM	REF. JES. MARK	COMMON NAME	PLANT SIZE	PLANT	PLANT	PLANT	PLANT
SMALL TREES																
5	ACR1		Acacia saligna		5	20-40'	red ball cacti	14	PA11		Parsons Leguminosae	Chapman City	10-15'	145	145	yellow ball cacti
5	ACR2		Acacia saligna		5	20-40'	red ball cacti	21	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
11	CE2D		Cedrus deodora		11	20-40'	yellow ball cacti	PERENNIALS								
1	WRE1		Wisteria floribunda		1	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
4	WRE2		Wisteria floribunda		4	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
2	WRE3		Wisteria floribunda		2	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
2	WRE4		Wisteria floribunda		2	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
HYDRANGEA TREES																
2	HY1		Hydrangea arborescens		2	20-40'	yellow ball cacti	GROUNDCOVERS								
2	HY2		Hydrangea arborescens		2	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
ORNAMENTAL TREES																
1	OR1		Ornithogalum nuttallii		1	20-40'	yellow ball cacti	SMALL SHRUBS								
1	OR2		Ornithogalum nuttallii		1	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
1	OR3		Ornithogalum nuttallii		1	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
1	OR4		Ornithogalum nuttallii		1	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
1	OR5		Ornithogalum nuttallii		1	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
SMALL SHRUBS																
1	SR1		Syringa vulgaris		1	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
1	SR2		Syringa vulgaris		1	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
1	SR3		Syringa vulgaris		1	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
1	SR4		Syringa vulgaris		1	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	
1	SR5		Syringa vulgaris		1	20-40'	yellow ball cacti	10	SEAD		Sedum spectabile	10-15'	145	145	yellow ball cacti	

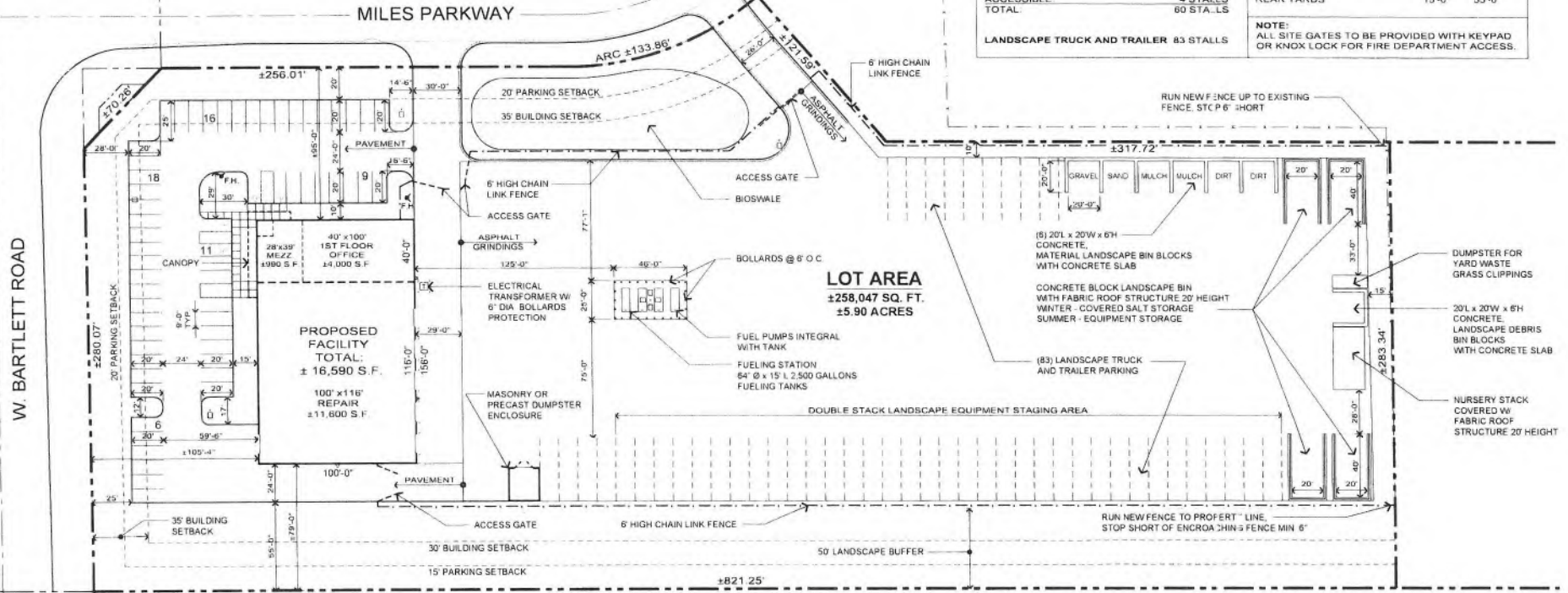
LANDSCAPE PLAN

SCALE: 1" = 10'
DATE: 10/15/2010
DRAWN BY: [Name]
CHECKED BY: [Name]
L.I.O.



LOCATION MAP
SCALE 1/8" = 100'

PROJECT DATA		PROPOSED BLDG. HEIGHT :	
ZONING DISTRICT: PD PLANNED DEVELOPMENT		25'-0" 1-STORY	
LOT AREA	± 5.90 ACRES ±258,047 SQ. FT.	MAX. BUILDING HEIGHT:	45'-0"
OFFICE	±4,000 SQ. FT.	FLOOR AREA RATIO:	±15,600 SQ. FT.
REPAIR	±11,800 SQ. FT.	ALLOWED MAX. FAR	0.5
MEZZANINE	±990 SQ. FT.	FLOOR AREA RATIO:	0.06
TOTAL BUILDING AREA	±16,590 SQ. FT.	ALLOWED MAX. FAR	0.5
PARKING REQUIRED		LANDSCAPE PERCENTAGE	
OFFICE	15 STALLS	LANDSCAPED OPEN AREA:	±78,675 SQ. FT.
1/275 (4,000 S.F.)		TOTAL LOT AREA:	±258,047 SQ. FT.
REPAIR	30 STALLS	PROPOSED LANDSCAPE %:	30.4%
1/500 (11,800 S.F.)		MIN. AREA OF LANDSCAPE :	20% (NOT LESS)
PLUS 1 SPACE PER 1.5 EMPLOYEE		BUILDING SETBACKS	REQD. PRPSD.
MEZZANINE	4 STALLS	FRONT YARDS	35'-0" ±95'-0"
1/275 (990 S.F.)		SIDE YARDS	35'-0" ±105'-4"
ACCESSIBLE:	2 STALLS	REAR YARDS	30'-0" ±79'-0"
TOTAL	51 STALLS	PARKING SETBACKS:	REQD. PRPSD.
PARKING PROVIDED		FRONT YARDS	20'-0" 20'-0"
STANDARD	56 STALLS	CORNER YARDS	20'-0" 25'-0"
ACCESSIBLE	4 STALLS	REAR YARDS	15'-0" 55'-0"
TOTAL	60 STALLS		
LANDSCAPE TRUCK AND TRAILER	83 STALLS	NOTE:	
		ALL SITE GATES TO BE PROVIDED WITH KEYPAD OR KNOX LOCK FOR FIRE DEPARTMENT ACCESS.	



PROPOSED SITE PLAN
SCALE 1" = 30'-0"
0 30 60 NORTH

SP-1

PROJECT # 23020
DATE 06/14/2023
REVISIONS 01/18/2024
SCALE AS NOTED

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OWNER:
ALAN HORTICULTURE LLC.



PROPOSED LANDSCAPE
SERVICE FACILITY

NEC W. BARTLETT RD. & MILES PKWY.
BARTLETT, IL 60103

DESIGN BUILDER:



10150 SOUTH VIRGINIA AVENUE, SUITE J
CHICAGO RIDGE, IL 60415
(708)423-8200

ARCHITECT/PLANNER:

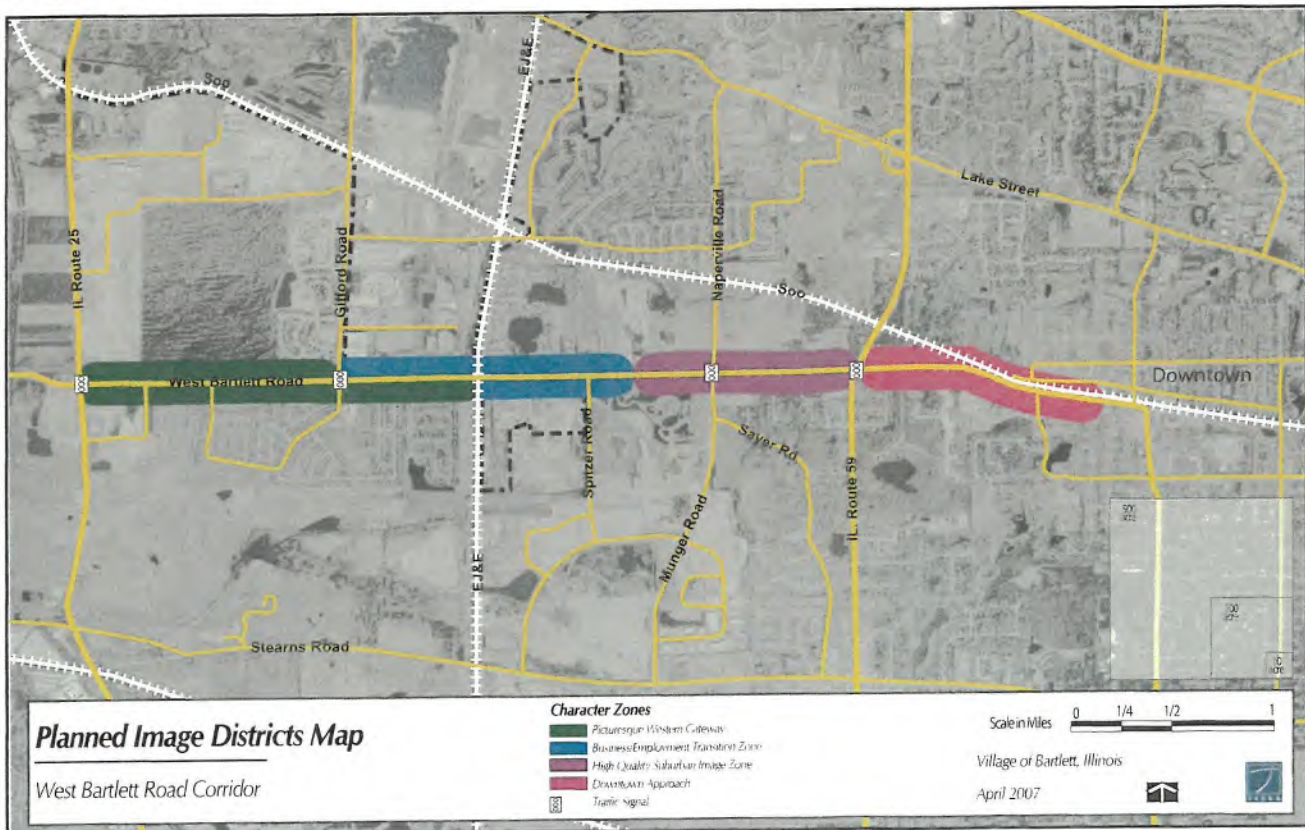


10442 Aves 1500, Street Station, Chicago, IL 60648
(773) 228-1144

Design Guidelines

The West Bartlett Road Corridor Design Guidelines are intended to put into place specific standards that reflect the value-derived goal relating to the design goals of the West Bartlett Road Corridor. The goal is to integrate the West Bartlett Road Corridor into downtown Bartlett in an attractive, functional and market-oriented fashion. Doing so will promote the vitality, economic health, livability and sense of place of the corridor district by enhancing its design elements and its physical appearance.

Before this overall design goal can be translated into specific design standards, it is helpful to identify distinct planned image districts for the Corridor. This is necessary because the corridor is long and the roadway and land uses contain divergent characteristics. At the western end of the Corridor the roadway is characterized as the Picturesque Western Gateway because of its natural and environmental amenities and its function as a primary entry point into the Village. Moving east, the next part of the roadway is characterized as the Business/Employment Zone because of the existing higher intensity commercial uses and the plans that will convert some of those uses to residential, business and office uses. The next roadway section is characterized as the High-Quality Suburban Image Zone because of existing and future residential uses that will dominate this section, along with integrated institutional and commercial uses. The final roadway section is characterized as the Downtown Bartlett Approach because of its role connecting the Corridor to the downtown area. See *Planned Image Districts Map* below.



The particular design principles and guidelines that follow are intended to ensure that new development and redevelopment enhance the visual quality and identity of the West Bartlett Road Corridor. It establishes architectural principles and urban design standards for the built environment and rights-of-way so as to create a recognizable corridor district with an appealing atmosphere that reflects harmony and continuity in building design and streetscape improvements based on each of the four image districts that demarcate the roadway corridor. The design guidelines described herein are intended as tools for communicating the design intent for future developments, redevelopments and streetscape improvements.

Picturesque Western Gateway: To protect and promote existing views from the roadway to commercial, business/office park, open space and residential landscape buffers. The principles of the Picturesque Western Gateway are to:

- Create a Gateway to the Village at West Bartlett Road and IL. Route 25
- Preserve views of natural areas and environmental amenities
- Integrate commercial and business/office park areas into the Gateway
- Enhance landscaped buffers separating residential areas from the roadway

Table 4: Design Guidelines for the Picturesque Western Gateway

ENHANCEMENTS OF PRIVATE DEVELOPMENTS FRONTING PUBLIC R.O.W.	
BUILDING FORM	
Orientation	Residential, commercial and office buildings should be placed near to the landscape buffer along the street, should share parking access drives, and should have attractive front facades facing both the street and the shared parking.
Setbacks	Buildings should be set back from the Corridor behind a large landscaped buffer.
Proportion, Size, Scale	Residential, commercial and office buildings should be proportioned such that they are viewed as structures nestled into the landscape, rather than as dominant features on the site.
EXTERIOR BUILDING TREATMENTS	
Façade Treatments and Materials	Residential, commercial and office building types should express attractive façades on all exposed faces of the buildings. Building materials should combine a mixture of materials, such as stone masonry, brick masonry, siding, and glazing.
Roofing Treatments and Materials	Residential, commercial and office roof types should be expressed at all façades of the buildings utilizing gable, hipped or gambrel roofs. Roof materials should be selected such that they are visually subdued, such as neutral color selections of wood, asphalt, or fiberboard shingles.
SITE ENHANCEMENTS	
Parking	Residential parking should be provided in garages, which should express similar building proportions, façades and rooflines as those mentioned above and should be located such that they are set back from the residential access road. Limited on-street visitor parking may be provided on the residential access roadways. Commercial and office parking and service areas should be screened from view of the corridor with bufferyard landscaping. Truck docks and loading areas should be screened from view of the corridor or be fully enclosed.
Landscaping	<p>Landscape areas and plantings should be organized such that they reflect the native landscape features found in the conservation areas throughout Bartlett.</p> <ul style="list-style-type: none"> ▪ Parkway areas should include groves of mixed-size native canopy and understory tree plantings. ▪ Open space areas should include naturalized groupings of mixed-size evergreen and understory trees and shrub plantings. ▪ Gateway entry areas should emphasize main entrances to development sites through the use of ornamental trees, shrubs, and perennial and annual plantings including ornamental/native grasses. ▪ Bufferyard areas should include naturalized groupings of mixed-size native canopy trees, evergreen trees, understory trees and shrubs planted on berms. ▪ Detention areas should express curvilinear forms, which invite wildlife habitat and resident use. The edges of the detention areas should express shallow grades, planted with a variety of native grasses and groundcovers, such that a variety of landscape and wildlife will be attracted to the area.

Signage	<ul style="list-style-type: none"> ▪ Entry, wayfinding and directional signage should be organized and selected such that text and graphics are clearly visible and understood. ▪ Development site entry signage should promote West Bartlett Road as an extension of the downtown area. ▪ Signage materials should be selected such that they are visually subdued, such as neutral color selections of stone, wood, and/or metal. ▪ Signage should architecturally match or complement the building/development to which it belongs.
Lighting	<ul style="list-style-type: none"> ▪ Pole-mounted lighting in the residential parkway areas should be selected so as to minimize glare or light spillage onto residential properties. ▪ Light fixtures should be upgraded from the standard light pole/fixtures to the light pole/fixtures designated for the Corridor west of IL. Rt. 59 as shown in <i>Exhibit 6</i>.

ENHANCEMENTS WITHIN PUBLIC R.O.W.

Barriers and Wayfinding Signage	<ul style="list-style-type: none"> ▪ These elements should contribute to a unified Corridor appearance. ▪ Barrier railings of wood or black aluminum or barrier walls constructed of stone or other masonry should be included to represent the native landscape features found in the conservation areas throughout Bartlett. ▪ Entry, wayfinding and directional signage should be strongly pronounced in this area to promote the western edge of the corridor as a significant gateway. Signage should be organized and selected such that text and graphics are clearly visible and understood, and banners attached to light poles should be utilized when appropriate. ▪ Signage materials should be selected such that they are visually subdued, such as neutral color selections of stone, wood and/or metal.
Roadway Lighting and Signage	<p>Decorative vehicular-scale light poles should be selected along the roadway area. Where continuous pedestrian pathways occur, vehicular scale light poles should be augmented with pedestrian scale fixtures (see Exhibit 6). Banners attached to light poles should be included to promote a unified Corridor appearance. Utility lines should be buried.</p>
Landscaping	<ul style="list-style-type: none"> ▪ Landscape plantings within the right-of-way should reflect the native landscape features found in conservation areas throughout Bartlett. ▪ Parkway plantings should include groves of mixed-size native canopy and understory tree plantings. ▪ Bufferyard plantings, which abut residential, commercial and office uses, should include a medium-height landscaped berm planted with naturalized groupings of mixed-size native canopy, evergreen, and understory trees.
Intersections and Pedestrian Crossings	<p>The intersections at IL Route 25 and Gifford Road, both signalized intersections, should be enhanced to promote safe pedestrian crossings. Enhancements should include decorative paving at the intersection corners, decorative paving at widened pedestrian crosswalks, bollards, timed traffic signals, plantings, and additional lighting.</p>
Pedestrian Walkways	<p>The existing bike path/pedestrian walkway along the south side of West Bartlett Road should be protected and promoted as a significant pedestrian linkage between the Picturesque Western Gateway and downtown to the east. Enhancements such as directional and wayfinding signage, additional parkway plantings, additional bufferyard plantings, decorative lighting, and accent paving would reinforce the bike path/pedestrian walkway as a safe and attractive access route to and from the downtown area.</p>



Agenda Item Executive Summary

AGENDA ITEM: Branding Concept BOARD OR COMMITTEE: Committee

BUDGET IMPACT

Amount N/A Budgeted N/A

Fund: N/A Corresponding Activity Measure: N/A

EXECUTIVE SUMMARY

Developing a new community brand is one of the goals of the villages strategic plan. The new branding concept would be used to create positivity within the community as well as bring more attraction to the community in the economic development sense via tourism and new businesses. In 2022, staff crafted an RFP/RFQ for community branding combining elements of several other communities, which resulted in seven inquiries. The submittals were brought to the EDC for their recommendation and A5 branding was unanimously recommended to the board. The village board contracted with A5 and tonight they will present several different concepts for the board to review. These concepts were developed with significant preliminary work including community surveys, round tables, interviews, and attendance at community events. The board is requested to choose a campaign theme for the village's new community brand.

ATTACHMENTS (PLEASE LIST)

Memo

RELATIONSHIP TO STRATEGIC PLAN GOAL

Strategic Plan Goal: Continue Implementation of Community Branding Plan

Short Term (1-3 Years): Routine Complex

Long Term (3-5 Years): Routine Complex

ACTION REQUESTED

- For Discussion Only
- Resolution
- Ordinance
- Motion

MOTION:

Staff: Scott Skrycki, Assistant Village Administrator

Date: February 13, 2024

Memorandum

To: Paula Schumacher, Village Administrator
From: Scott Skrycki, Assistant Village Administrator
Date: 2/13/2024
Re: Implementation of Community Branding Plan

BRANDING

Developing a branding concept has been part of the strategic plan for several years. However, the goal was put on hold for two primary reasons: the COVID-19 pandemic and ongoing pipeline development. Now that the pandemic has subsided and development in Bartlett has reached unprecedented levels, it has been determined that it is a good time to initiate this particular goal within the Village's strategic plan.

The goal of the plan is to bring awareness to all the community's offerings by establishing and enhancing the identity and image of the community. The new branding concept aims to create positivity within the community and attract more attention in terms of economic development through tourism and new businesses.

Presented this evening are a series of concepts provided by A5. These concepts were developed with significant preliminary work, including surveys, round tables, and attendance at community events.

An important note about the branding bullet point in the strategic plan is that its influence will extend into many other strategic plan goals set forth by the board and community. These include enhancing communication to stakeholders, improving community events, continuing the business recruitment strategy to attract developers to invest in the downtown area, providing options for businesses to locate in Bartlett, working to enhance the retail business profile in the village, implementing proposed TIF, as well as achieving other objectives within the plan.

HISTORICAL CONTEXT AND VILLAGE CONTRACT

In 2022, staff crafted an RFP/RFQ for community branding, combining elements from several other communities, which resulted in seven inquiries. Staff reviewed and analyzed those submissions and presented two to the EDC; the unanimous decision was to go with A5.

Since the selection of A5, the Village Board voted on a contract with A5 to engage in a multi-year campaign not exceeding three years and no more than \$25,000 in the first year. Staff budgeted \$50,000 for year two. This will include, but is not limited to, social media boosts, good ads, swag,

media appearances, Metra or bus ads, along with radio and digital. Collaboration with A5 on a plan for the golf course is also planned.

GOING FORWARD

The Village Board will review several concepts. Upon choosing a concept to “brand” the Village with, there will be a cascading rollout over the next several years. The concept will be used in marketing materials, social media, trade shows, and more to advance the reputation of the Village. There will also be several key metrics demonstrating the success of the campaign. The action requested tonight is to choose a campaign. Attached is the data collected; the actual graphic concepts will be revealed at the committee of the whole.

**a5 Branding
& Digital**

Bartlett Community Identity: Engagement Results

January 9, 2024

Goals

- Lay the foundation for a multi-year Village marketing campaign with limited, planned content updates throughout the next several years.
- Promote Bartlett as a regional shopping, dining and recreational destination in the northwest suburbs.
- Increase regional awareness of Bartlett businesses and restaurants, with a focus on broadening its reach beyond Bartlett residents.
- Enhance the Village's social media presence and increase overall social media engagement.

Goals

- Produce branded advertising content that the Village can reuse beyond the scope of the campaign to continue to promote the Village.
- Design updated marketing tools to be utilized at trade shows and local business events.
- Promote Bartlett to prospective developers & businesses including those seeking additional locations.

Goals: Year 1

Outreach and Engagement/ Familiarization

To capture the Bartlett story, we need to get to know Bartlett and its people. We propose to conduct outreach and engagement to learn what makes Bartlett different and special.

Campaign Concept Development

Using what we learned in the outreach and engagement, we would develop and present at least three campaign concepts that meld visuals—a logo, logotype, etc.—with themes and words that capture and convey the energy of Bartlett.

Photography

For year one, a5 proposes to conduct one half-day of photography with the Village of Bartlett.

Goals: Years Two & Three

Video Production

Produce multiple videos with a maximum of one minute in length promoting tourism to the Village & Bartlett businesses in general.

Development of Marketing Tools

Email templates, rollup banners, rack cards, posters, etc.

Social Media/Digital Media Asset Creation

Produce digital media marketing campaign, coordinate social media-driven campaign with cross-promotion via Facebook, LinkedIn, Twitter and Instagram.

Ongoing Account Management

Continued evaluation and recommendations (social, SEO, web content).

Outreach & Engagement

Outreach & Engagement

a5 conducted engagement and outreach with different groups in a variety of ways:

- Email survey to groups
- Email survey to residents
- Social media, app and website outreach
- Individual/group interviews

1,022 total surveys were collected.

Outreach & Engagement: Meetings/Interviews

- Economic Development Committee
- Village Board
- Village Department Heads
- Pam Rohleder, Village History Museum
- Karolyn Wessel & Mallory Untch, Bartlett Library
- Terry, Spin Doctors Bike Shop

Outreach & Engagement: Surveys - Village

- Village app (184)
- “Trending Now” newsletter (16)
- Village social media (259)
- Village website (4)
- Village Hall staff (31)
- Village business contact list (5)

Outreach & Engagement: Surveys - Community

- U46 staff, parents, students (Bartlett schools only)
 - Staff = 82
 - Parents = 226
 - Students = 30
- Chamber of Commerce (46)
- Lions Club (2)
- Faith Leaders (4)
- BAPS Community (55)
- Library newsletter recipients (31)
- National Night Out (47)

What We Heard: Meetings/Interviews

Describe Bartlett in one to two words:

- Generational
- Safe
- Values
- Grounded
- Chosen Town
- Little City
- Well-Rounded
- Resilient
- Welcoming
- Community
- Supportive
- Great Town
- Home
- Connected
- Partnerships
- Oasis

What is special about Bartlett?

- Diverse and older architecture
- Feels like a walkable, charming community
- Lots of community activities
- Partnerships among all the Village entities
- No large highway or main road through the Village
- Still has small town feel
- Bike paths, parks and open spaces

What is special about Bartlett?

- Services provided by the Village
- Police Department - present and responsive
- Civic groups - involved and active
- Residents have similar values
- People respect each other and the community as a whole
- Community events - 4th of July, National Night Out, Cocoa Crawl
- Some Village history is tied to national events

What We Heard:

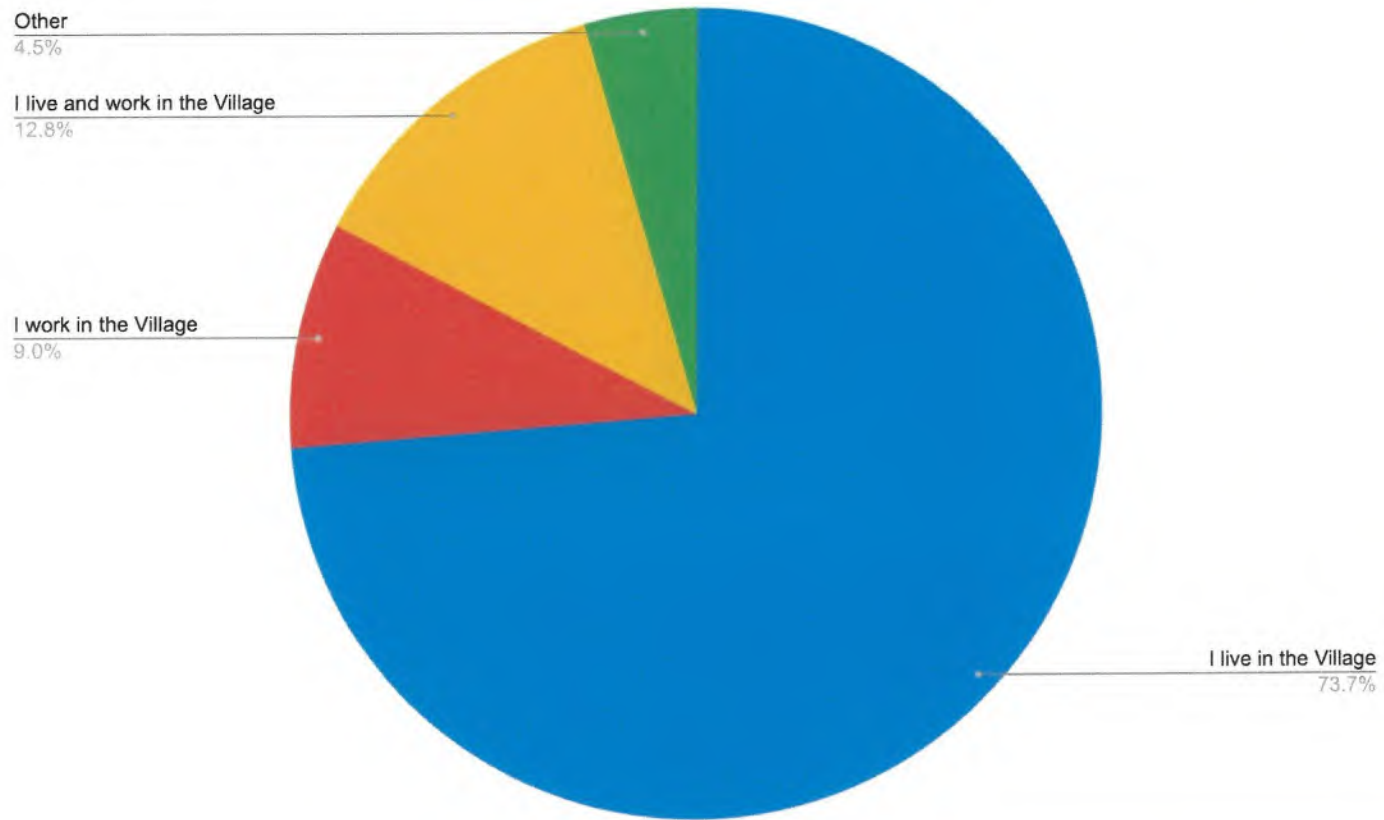
- The civic groups–Lions Club/Rotary/Women’s Club/Historical Society–make the town.
- The town has grown with me.
- It is safe here and the statistics match the feeling.
- People choose to stay because of the small-town feel.
- Sports bring exposure to the town and businesses.
- Property values are growing due to the engaged, diverse community.
- “Mindful Sustainable Growth”.
- Be strategic about commercial development on the west side.
- Part of the branding needs to focus on the features of the Village that draw residents and businesses.

What We Heard - Challenges:

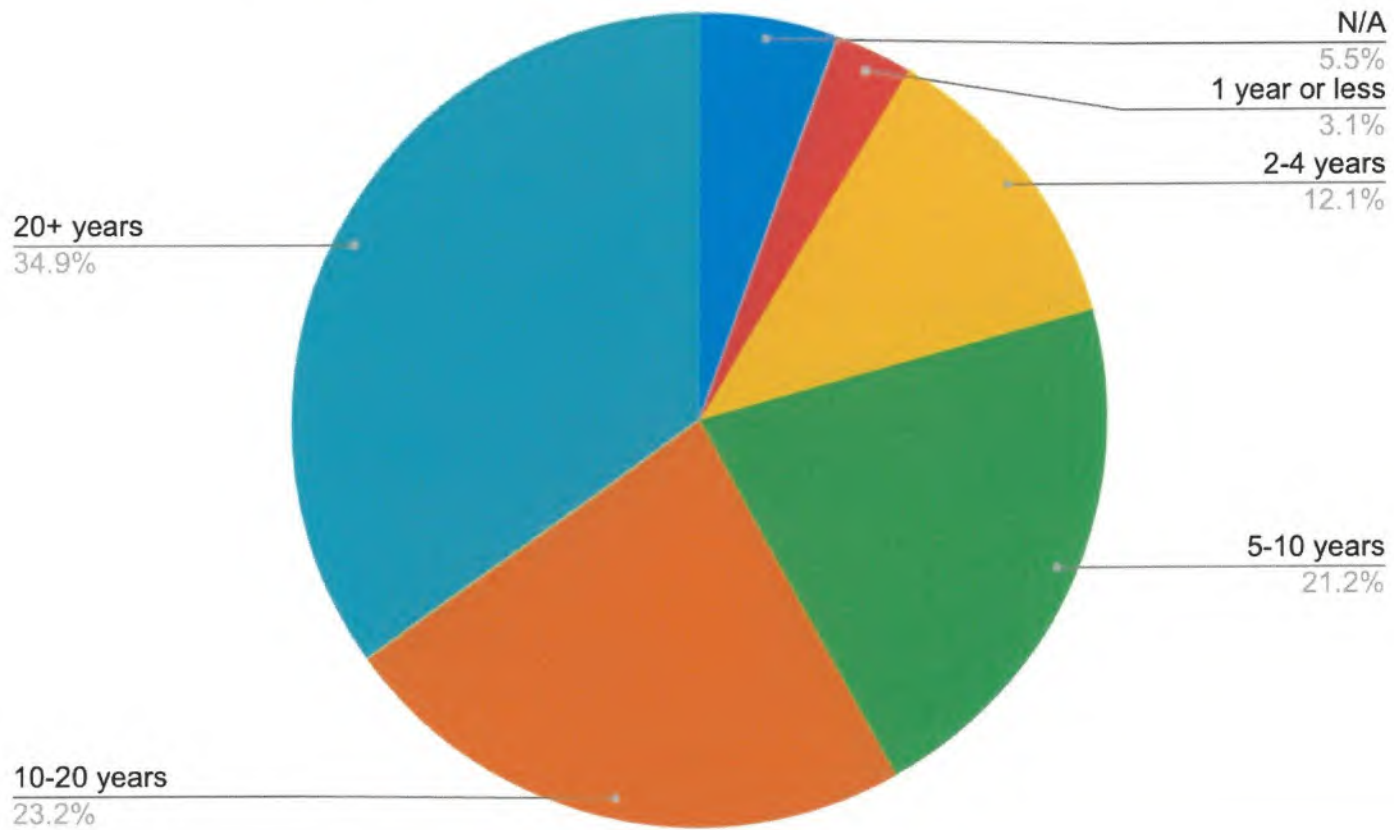
- The train company merger has increased train traffic
- Maintaining momentum
- Staying flexible with the growth
- Trying to keep the community livable
- Evolve with the trends and demographic changes of the residents
- Maintaining infrastructure so older residents can “age in place”
- Population age is increasing
- Managing the TIF
- U46 reputation

What We Learned: Surveys

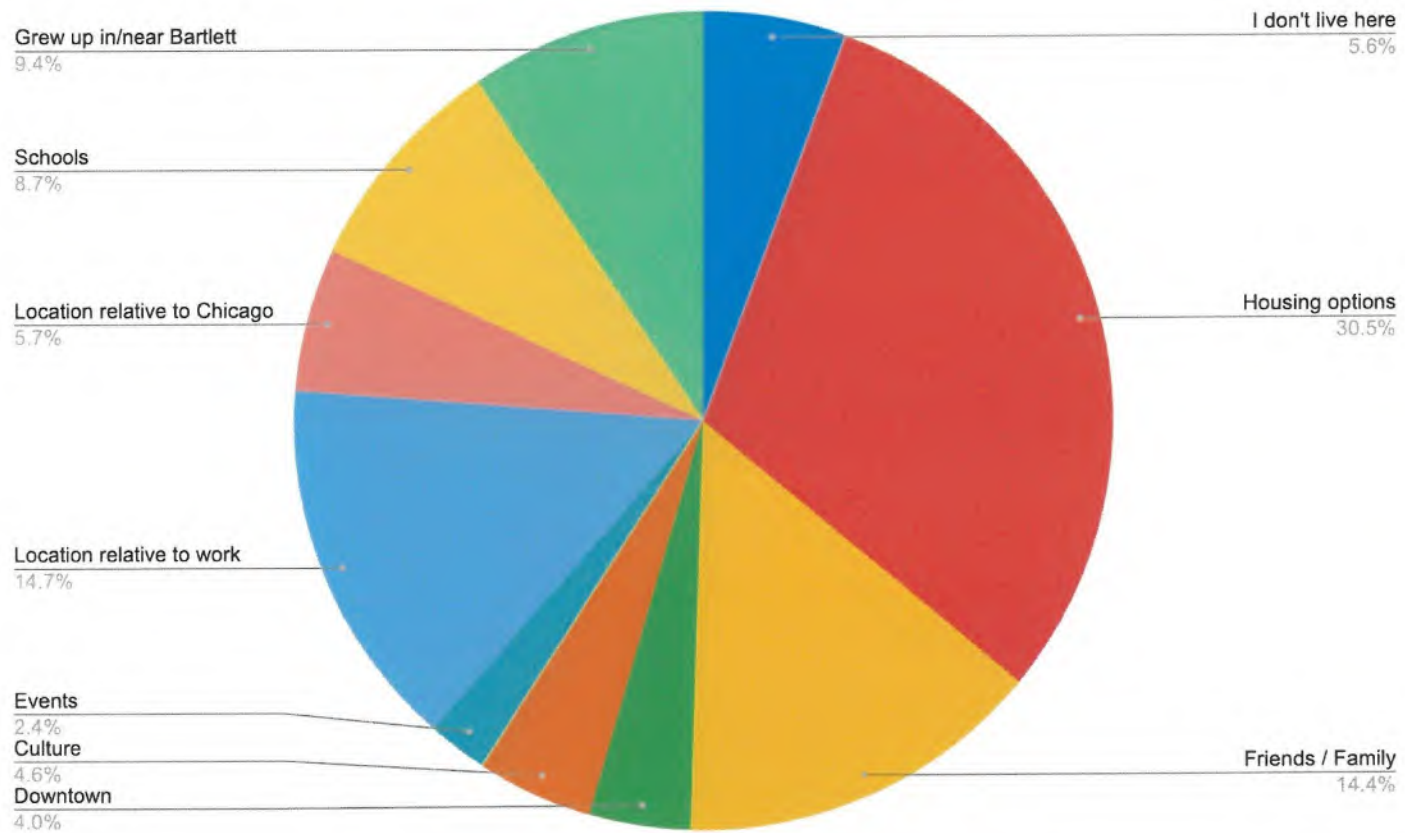
How are you involved with the Village of Bartlett?



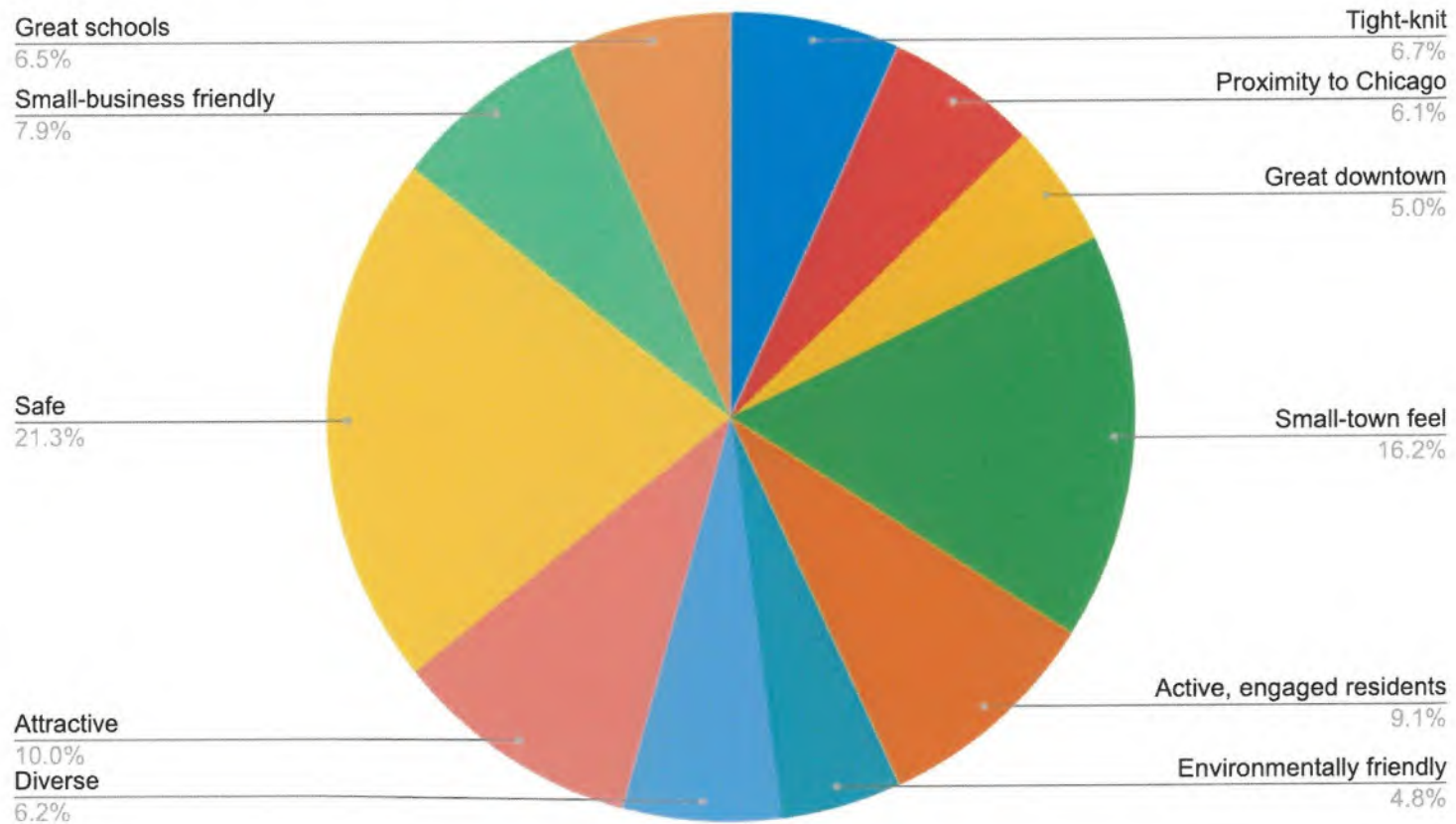
If you live in Bartlett, how long have you lived in the Village?



Why did you move to Bartlett?



Check all descriptions that apply to Bartlett's community identity.



If you have friends or family come to town, what do you show them and where do you take them?

- Downtown (64)
- Local restaurants (58)
- BAPS (55)
- “Pate” Philip State Park / Bike paths (46)
- Out of town (Chicago, St. Charles, Geneva, Naperville) - (46)
- MORE Brewing (30)
- TL’s (20)
- Banbury Fair (13)
- 120 Live (12)
- 4th of July events
- 2Toots

If you have friends or family come to town, what do you show them and where do you take them?

- Arts in Bartlett.
- Villa Olivia.
- Park District.
- One of the Village events.
- We do not have anything in Bartlett. Our community is nice, but lacks fun places to show visitors. We have maybe three sit-down restaurants and it lacks family entertainment. We are primarily industrial, with fast food restaurants, lacking quality restaurants and very little commercial shopping worthy of a visit.
- I show them the office that I own and take them to the restaurants and bars that I am friendly with. We will watch youth sports at Koehler, Ruzicka or the local high schools. For nice meals we go to TL's or Tokyo Steakhouse.

If you have friends or family come to town, what do you show them and where do you take them?

- Downtown Wheaton or St. Charles. Next time we'll try MORE Brewing now that it's there.
- Show them the downtown area as we pass through to go to downtown Barrington as that has more to offer.
- Wish the downtown area was similar to the Wheaton area. We need more businesses, restaurants to fill the downtown area and become a place to walk around and hangout with family for all months in the year. I love the new addition of MORE Brewing but we need to attract more businesses.
- Nothing in Bartlett. There's nothing here and everything closes early. This is a town for old people. We always have to go to Elgin or St. Charles.
- We go to the restaurants, downtown area. Downtown could use a couple of small shops like downtown Geneva.

If you have friends or family come to town, what do you show them and where do you take them?

- Downtown area. We often visit the restaurants (Le P'tit, MORE, TL's, V&V, 120 Live, and Rebecca's Cupcakes). Also, we enjoy hiking in Hawk Hollow Forest Preserve.
- Downtown. BAPS.
- Starting to take them downtown as it is finally starting to be something.
- I show them the parks and walking trails. We might visit a local restaurant.

How would you like Bartlett to be perceived?

- Safe. (207)
- Small-town feel. (81)
- Small-town feel, with big-city entertainment.
- A safe, friendly community to raise your family.
- Bartlett is a beautiful place, but for some reason, not a lot of people connect the dots that Bartlett is on the map.
- Diverse and accepting of all cultures.

How would you like Bartlett to be perceived?

- Upscale, with great dining and shopping.
- Safe town, great schools and a lot to offer.
- Small-town feel but modern.
- Safe, engaged, positive.
- Place for families to grow.
- Great place to live and do business.
- Friendly, nice. Forest-preserve areas, good restaurants and entertainment.
- Sought-out suburban community.

How would you like Bartlett to be perceived?

- As a fun place to hang out, with a lively nightlife and restaurant options.
- Family and business-friendly, safe.
- Upcoming, lively, vibrant downtown, safe neighborhood, friendly and walkable to stores and restaurants.
- Progressive.
- Unique.
- Fun, welcoming place to go with a small-town feel, like Geneva or St. Charles.
- Small town but diverse and inclusive; working/middle-class environment.
- Welcoming, progressive city that has easy access to Chicago.
- Small town but diverse and inclusive; working/middle class environment.

How would you like Bartlett to be perceived?

- I want Bartlett to be perceived as it currently is, a bit small-town with a suburban size. It'd be possible to develop the 59 corridor commercially and return the small-town family friendly vibe east of 59.
- Family friendly, quaint, walkable.
- Safe town, family friendly and financially stable.
- Friendly; small-town feel; lots of good restaurants/bars; a great place to live.
- As a town that is known for great entertainment and dining options.
- Would like it to be perceived as a safe and friendly community with AFFORDABLE places to eat.
- More active, walking downtown with variety of ethnic foods and restaurants.
- A great place to visit with many choices for people so there's a reason to come.

How would you like Bartlett to be perceived?

- Small town, but innovative and unique like having a European-style pedestrian friendly downtown and very safe/low crime - a great place to raise a family.
- Small, urban town with walkable downtown.
- Small town with a nice downtown, with great restaurants and shops. Bars and dining options in close proximity to downtown near the Metra so others want to come to Bartlett.
- One of the safest towns in Illinois.
- All of the items I checked, small-business friendly, engaged residents, safe, tight-knit and also I wish it was more diverse, more environmentally friendly. I think towns like this especially misunderstand what diversity really means and looks like, however well intended.
- Small town, friendly, lots of small businesses downtown.
- Great small town with a vibrant downtown and great community events.

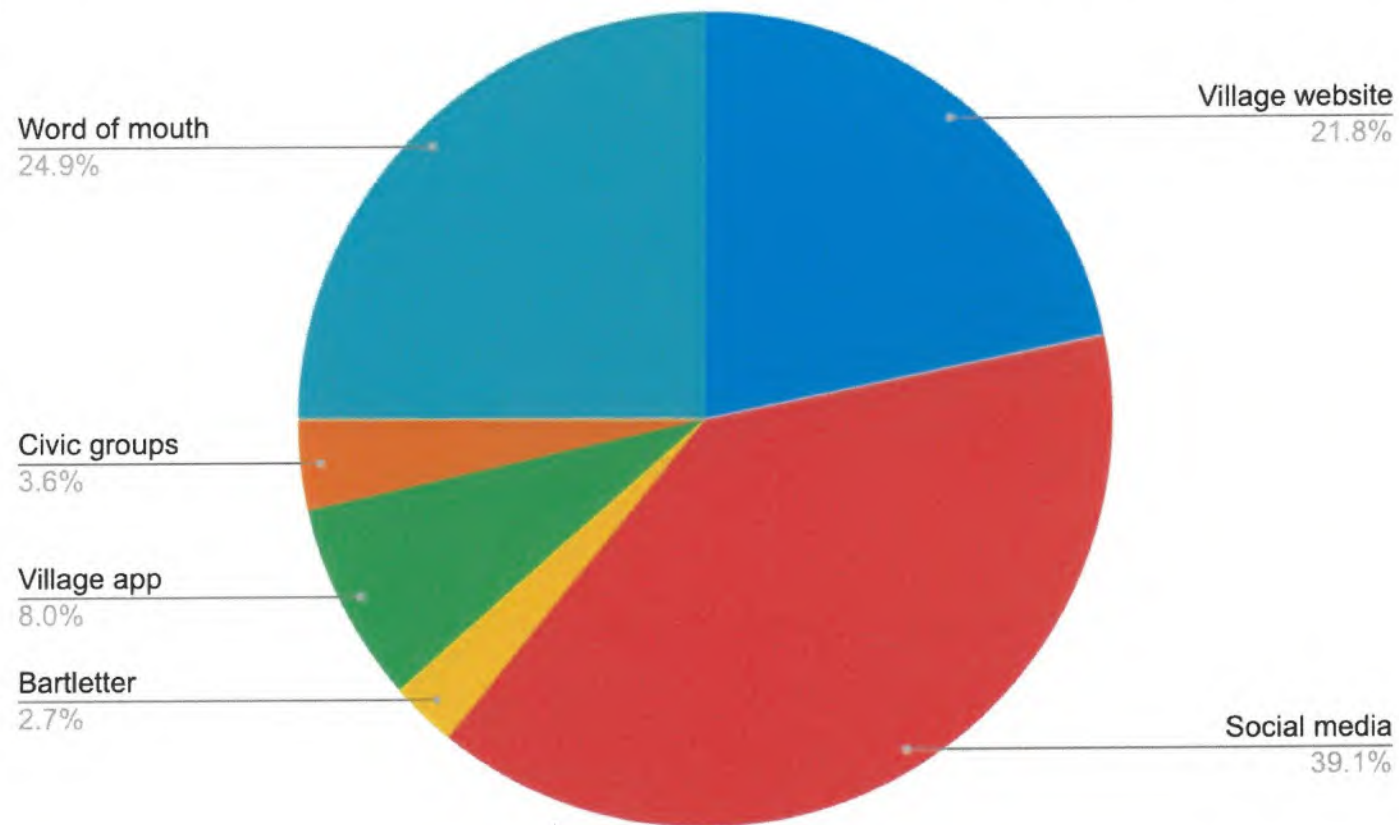
How would you like Bartlett to be perceived?

- Safe, clean, friendly to all political parties, supports local business, works hard to help citizens with solar energy and other energies that help our environment, does projects to make our environment safe and clean for animals & people, clean waterways and good natural places for us to explore and enjoy.
- Diverse, smaller town with a good governing body that has the best interests of the residents in mind. We are growing due to our trustees that are always looking to bring new companies into our town. But not letting things get out of control.
- Great small town with a nice downtown that attracts people to amazing shops, restaurants and bars. Easily accessible from other towns.
- I would like it to be perceived as a safe, small town with a diverse population and easy access to Chicago (via train).

How would you like Bartlett to be perceived?

- As having an awesome downtown area. I feel that it's slowly being updated (MORE Brewing, The Boss' Signature, etc.) and it needs more updates to the older buildings and could build downtown condos/apartments similar to what Glen Ellyn, Elgin, Naperville, Wheaton, etc. have done. And a parking garage would be helpful too, for community events b/c there's never any parking and the local residents get angry when people park on their streets. Also needs more new restaurants with better menus, different kinds of foods, etc.
- Small town feel but knowing there are 40,000 people. Hopefully more new restaurants will open to keep residents in town to eat instead of going to other nearby towns for dinner.
- Charming hub for variety of restaurants, walkable town for living essentials, welcoming, safe, good variety of community events, diverse.

How do you get information on events and other happenings in Bartlett?



What is your favorite thing about Bartlett?

- Safe. (128)
- Small-town feel. (82)
- People. (64)
- Downtown. (33)
- I do like the engagement from the Police and Fire Department with the open house & willingness to chat when I see them around. I also appreciate the 4th of July Special Needs Day. We have a child in a wheelchair and him being able to attend with less crowds has been awesome.
- Walkability.
- Location and schools.
- Bartlett gives off the typical 'homey' feeling.
- Longevity of the people I know that live here.

What is your favorite thing about Bartlett?

- Lots of wonderful residents who are friendly. The Police Department is great.
- We just like most everything about Bartlett. It is home. Great Fire Department, great Police Department, etc.
- I love that it has a small-town feel but still centrally located to many other great villages (St. Charles, Geneva, Batavia, Wayne) plus all the great forest preserves.
- I like the fact that the Village is a safe and generally friendly place to live. I like the diversity of the residents. The trail system is something I often use.
- It used to have the small-town feeling. We moved here in 1995. But now it has grown so much, especially on the west side of Route 59. We kind of lost that small-town feeling. It feels more like a small city now and less like a Village.
- Relationships built through kids sports with other families.

What is your favorite thing about Bartlett?

- Location: we see herons, hawks, ducks fly behind our house, we have fox, coyote, skunks, turtles, raccoons, rabbits visit our back yard and field throughout the year – it's like a nature show. I love to see the horses and barn on Bartlett Road as I drive downtown. Our library is great, community center is great, we even have a food-allergy safe bakery! Train station is pretty, great little museum. Police are fast responders and are amazing, so is our fire department. We are small, yet big enough.
- Park District.
- Events.
- It's in the middle of everything.
- You care about your residents and what is important to us. You work hard to communicate with us as well. It's a beautiful, friendly community.
- Close to transportation, there seems to be good efforts to bring in new businesses.

What is your favorite thing about Bartlett?

- The Facebook posts. Whoever is making the funny posts needs a raise!
- Close-knit groups.
- I grew up in Palatine and my husband in Des Plaines, so we love the train-town aspect. Our kids had a good education in U46 and we love the little street we live on because we are close to the Bartlett Community Center and Apple Orchard Golf Course.
- Just enough separation from busy roads so the downtown area isn't too congested, most amenities are walkable. Close to nature preserves. Good schools for my kids.
- I feel good here, every place has its issues. I just feel like our police department takes a no-nonsense approach to crime. They patrol and keep the ever-growing crime of Chicago out of Bartlett. We need to continue that and never back down. Our police, fire and community leaders are top notch!

What businesses would you like to see come to Bartlett?

- Additional, more diverse, ethnic, sit-down restaurants (116)
- Trader Joe's (64)
- Additional grocery stores - primarily west & south (53)
- Boutique/smaller shops downtown (45)
- Bakery/Coffee Shop (43)
- Movie Theater (15)
- Target (8)

What businesses would you like to see come to Bartlett?

- Less gambling places!
- Experience-oriented businesses; escape room, axe throwing, etc.
- Downtown needs further development. Nice to see Bartlett Plaza taking off. Aldi was a great idea too. MORE Brewing is awesome. Good seeds planted. Would love to see the land parcel next to the train parking lot develop with Class A apartments and ground-level retail. How about a nice independent coffee shop in downtown?
- Office Max with all the businesses in Brewster Creek.
- Bars, more known food options, bakeries, coffee shops, lunch spots.
- What we need is more fun places for all ages to have fun. We only have the bowling alley but little ones can't bowl. Maybe a fun, indoor activity center for kids. Example: Indoor miniature golf, bounce place and more places like this.

What businesses would you like to see come to Bartlett?

- More restaurants and bars that are open late. There is currently only one that is open late and it would be great to offer more of a night life for adults in their 40's and older.
- More shops downtown and less things like insurance companies.
- Trader Joe's, plant nursery, bakery (breads, pies, donuts and simple cookies) and an animal shelter, also, a theater like the Schaumburg 's Prairie Center.
- More grocery stores west of Route 59 is the most important. Lots of new houses there with nothing nearby.
- I am glad to see Aldi coming, as I think another grocery store was a big priority. Perhaps more restaurants downtown that are larger in scale, with a nice outdoor seating venue. More indoor training facilities, both for the children in sports but also for adults who want more access than perhaps the community center provides for adult leagues.

What businesses would you like to see come to Bartlett?

- Grocery store like Woodman's to compete with Jewel to lower their outrageous prices. Not a fan of Aldi. A hot dog stand since all three have closed recently.
- For years I have begged Trader Joe's to come but it looks like they sent Aldi instead, I'll take it, but if we could get a Trader Joe's; that would make my life complete. :) Allergy-friendly ice cream shop would be incredible. Shoe store-like a local, mom/pop shop. Resale shop-small mom/pop shop.
- Ones that do not support possible illegal practices and ones that are environmentally friendly. I'm not saying let's go "GREEN" just save what we have.
- Very excited about getting a grocery store in downtown Bartlett (especially Aldi!). That was the main missing piece.
- Aldi was the missing piece. We needed a grocery store near downtown.

What events would you like to see come to Bartlett?

- Concerts/live music
- Concerts in the park
- Bigger farmers market
- Park clean-ups
- Large book fair
- “The Taste of Bartlett” with music
- More winter and fall festivities
- Bike race
- Family-gearred events that allow involvement of small businesses

What events would you like to see come to Bartlett?

- Movies in the park.
- Celebration of tolerance and diversity.
- 5k race.
- Theater productions.
- Nothing - there is plenty already.
- More winter activities (lights, sleigh/carriage rides, ice skating).
- BBQ Competition in summer, Veterans/ Memorial Day celebrations or parades downtown.
- Perhaps more events with ADA-needs as a focus. Can we do a Halloween event or Easter Egg Hunt that allows for wheelchairs and other needs?
- More winter and fall festivities.

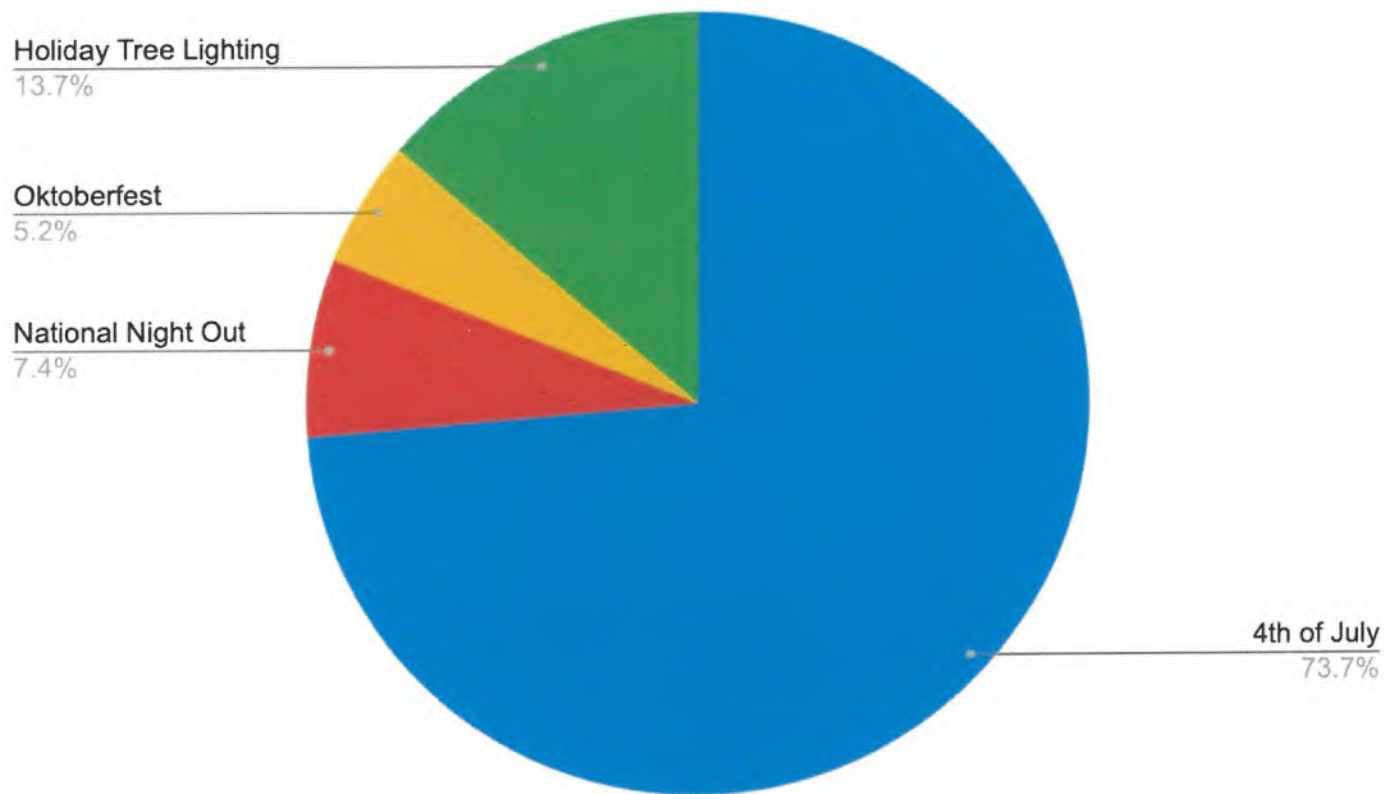
What events would you like to see come to Bartlett?

- Comedians, musicians, outdoor-music concerts on a smaller scale than the 4th of July, folk-Irish-blues-classical. Shakespeare in the park – like Ravinia. Green Events – environmental awareness/education.
- Concerts. Maybe we need a space and "band" shelter. Other than that, I feel our trustees have villagers safety and prosperity in mind.
- Concerts like Concerts in the Park in Cantigny.
- Ravinia-style concerts in the park.
- Bring back the annual Arts in Bartlett art fair. Would love a Blues Fest–most of the bands at our fests are pop/rock.

What events would you like to see come to Bartlett?

- An anti-litter campaign. Make it cool to pick up trash to Keep Bartlett Beautiful. Possibly make it a community-service project for civic groups. Supply litter bags around town. Raise consciousness/awareness. Wish they had built a band shell rather than a gazebo in Bartlett Park way back when. The existing gazebo is neither fish nor fowl... too big to be a charming, intimate gazebo but not conducive as a performing space either. If a band shell were there, the park would be a good space for a summer-music series. Perhaps there would be a way to modify the existing gazebo to make it more of a bandshell.
- Concert area for more summer outdoor music like Rosemont has 8-10 concerts a year with an itinerary so we can plan ahead.

What is your favorite community event?



Any other feedback about the Village that you'd like to share?

- The Village Board is high functioning and seeks input from residents. I appreciate the challenge of managing the finances to be conscientious and yet progressive. Kudos for effectively managing the TIF at Brewster Creek as this long-term view has benefited the community.
- Need to improve walking paths, biking paths and make town safer for kids to ride their bikes. Town does not have fully connected walking and biking paths. 59 splits in multiple locations making it difficult to walk to Target in Streamwood, walking to Stearns from Bartlett Rd.
- Thank you all for asking! It's too bad our Village is in an awful school district, especially for families with special-needs children. This is the only thing that I can think of that is wrong with Bartlett—and that's not Bartlett's fault.

Any other feedback about the Village that you'd like to share?

- The Village of Bartlett seems it doesn't care about the west side of Bartlett (across 59). We have no walking paths, bike paths near Amber Grove. Ever since that business park went in, there are so many semi trucks, gravel trucks speeding down Naperville Road. Maybe the Village should take control of Naperville Road from the Cook County highway department.
- I appreciate the communication in Bartlett, the friendliness of the police department and business like Le P'tit, Banbury Fair, The Boss's Signature, the library, Ace Hardware, the Lions Club, O'Hare's, Cherry on Top, McMae's Tavern... all businesses.
- There is no real defined downtown area. There's the Midway bowling area, then the downtown train area. Needs more stores to draw you into that area. Similar to Geneva, Naperville, Batavia areas.

Any other feedback about the Village that you'd like to share?

- Love that there are girls-softball seasons twice a year (fall & spring). Also love the softball clinics they do in winter to keep the kids engaged in sports. I love the outdoor pool but the indoor pool/hot tub/locker rooms desperately need remodeling. The design of the indoor pool is poor and too small. Having a water slide that ends up in the kids/toddler pool is not a good idea. It should end in the big, adult pool. The adult pool is too small. Should have more of an indoor waterpark feel with a lazy river, more than one water slide, etc. Hot tub is in poor condition (rusting, grout missing, etc.). Locker rooms are dated. Need to be bigger, more changing rooms, showers, etc. Love that Aldi is coming to Bartlett! Thank you!

Please add more downtown parking the way Glen Ellyn and St. Charles did... parking garage would be helpful especially near the train. More/better restaurants/bars like St. Charles and Geneva.

Any other feedback about the Village that you'd like to share?

- I would like to see more hiking/biking options and the safety that would need to come with that.
- This is the best place to live, so good that my son just purchased a house here so we're going to be two generations of happy residents!
- Just keep up the great work!
- It is a great community that I would love to live in, one day.
- Bartlett is a great place to live. I think the demographic is shifting and should be reflected in Bartlett's leadership and businesses we see and offer around town.
- Keep bringing in new things and more businesses to bring down taxes.
- I love living in Bartlett! So happy to see all the new businesses the last few years. The online water bill account could use some help; it never shows my payment history.

Any other feedback about the Village that you'd like to share?

- Make Bartlett more bike- and pedestrian-friendly. Add better markings at street crossings and perhaps flashing lights; the cars never stop for pedestrians at Western and Railroad Avenues. And even with the light at Main and Devon, cars do not yield for pedestrians. Add trails that connect the downtown to Tri-County Park, Pratt Wayne Woods and also along West Bartlett Road, along Route 59. Make it easier to ride bikes downtown and along Railroad Ave. Maybe add bike lanes, currently the path only goes from 59 to Western; bikes should not be riding on sidewalks. Adjust traffic lights to make it easier for pedestrians to cross major streets.
- I think you are aware of what people feel are the main issues. Picking up brush is still an issue. I had one branch that was less than four feet long, out there for weeks. They wouldn't take it, probably because I didn't have the obligatory twine around it. I found another way to dispose. I feel like you are forcing residents to do things they shouldn't because it is too difficult to do the right thing.

Any other feedback about the Village that you'd like to share?

- With inflation and taxes going up, we need to focus on what's important. Population is going to grow with all the new housing but nobody is really thinking ahead on traffic, schools, grocery stores, more amenities west of Route 59 and pushing the state to fix 59.
- The West side of Bartlett gets ignored by the Village. No push for commercial businesses west of Route 59, just more housing. West Bartlett Road, west of Naperville is in horrible shape as is Spaulding, west of the Metra tracks.
- I would just like for Bartlett to be a family-friendly, fun town for people to visit. I think it's family friendly, but wish the schools were rated higher and wish there was more to do here. I think there are businesses trying to make that happen though.

Any other feedback about the Village that you'd like to share?

- It has been wonderful to see Bartlett Plaza reinvigorated! The Village has been doing a great job recruiting new businesses like Aldi and encouraging new restaurants. We love how well maintained the streets are and how well plowed the roads are in winter. Our police department is very active in the community and seen as a positive asset. Overall, very glad to live in Bartlett.
- Good police presence.
- Get teenagers involved.

Any other feedback about the Village that you'd like to share?

- I continue to be concerned about the perception - real or imagined - that the Village of Bartlett does not work effectively with School District U46. I was here during the time there was an effort to disconnect from the school district. This was expensive, unneeded and frankly, stupid. Working together with other taxing districts is essential. Of course, issues need attention and dialog...but working together will benefit the community more than distrust or competition.
- Overall, I'm pleased with all that Bartlett has to offer but the Village appears to be overly child-oriented and doesn't have much to offer adults with older children or adults without children. That's why our all of our grown children moved out to live elsewhere. Truth. We need new condos with modern amenities.
- Thank you for seeking our feedback. I would like that the city include the residents west of 59 in their event and infrastructure planning.

Any other feedback about the Village that you'd like to share?

- We have way too many establishments with slots/gambling. I don't bring my kids to these places as they usually feel more like a bar than a restaurant.
- Have more things to do: movie theatre, live theatre, conventions, get a sports team, amusements, arcades, convention center. Create more things to attract people to generate more revenue for the Village so we can rival the surrounding towns that already have big attractions.
- Great place to live, but very poor for anything else.
- I think the Village has done a great job! Thank you!
- I'm proud of our town and its governance.
- Keep up all the great work! The community is evolving and lots of great things are being added.

Considerations

Considerations: Lean Into Strengths

- Safety
- Diverse tax-base
- Growing downtown
- Outstanding outdoor activity opportunities, i.e. “Pate” Philip Park, Villa Olivia, Bartlett Hills
- Small-town feel
- Strong civic groups
- Community diversity, i.e. BAPS

Considerations: Get Creative with Weaknesses

- Find the bright spots in schools and tell those stories
- Tell stories of locally-owned restaurants and retail
- Promote benefits of Brewster Creek
- Promote family-friendly aspects of the Village to encourage younger people to move to Bartlett
- Use successes of downtown attractions, i.e. MORE Brewing, 120 Live
- Capitalize on smaller events throughout the Village

Considerations: Capitalize on Opportunities

- Aldi helps downtown, fulfills a need
- Unite both sides of the Village by bridging the Route 59 divide
- Focus on being welcoming and inclusive
- Create ownable events that tap into outdoors, downtown, civic group strengths
- Launch TIF to continue to grow Bartlett
- Consider gateway and wayfinding signage to create stronger Village identity
- Be even more bike and pedestrian friendly

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& Digital**

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Agenda Item Executive Summary

AGENDA ITEM: Water / Sewer Rate Review BOARD OR COMMITTEE: Committee

BUDGET IMPACT

Amount	\$ N/A	Budgeted	\$ N/A
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Fund: Water & Sewer Funds	Corresponding Activity Measure:
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EXECUTIVE SUMMARY

Water and Sewer rates are reviewed each year during the budget process. The current water rate has been in effect since May 1, 2023, and the sewer rates have been in place since May 1, 2022. Based on the 4/30/24 estimated Water Fund balance, no increase in the rate is being proposed for the 24/25 fiscal year. The higher-than-expected fund balance is the result of an increase of about 3% in water consumption, increased interest income, and deferred projects. No sewer rate increases are being proposed as well. Increased revenue from charges for services and interest income, along with the use of American Rescue Plan Act funds have resulted in an estimated 4/30/24 balance of \$5,677,563. Rates will continue to be reviewed on an annual basis and increases will be needed in the future to fund the Capital Improvement Plan and ongoing debt obligations.

ATTACHMENTS (PLEASE LIST)

Memo, balance projections, capital projects summary

RELATIONSHIP TO STRATEGIC PLAN GOAL

Strategic Plan Goal: Maintain checks and balances to ensure financial stewardship

Short Term (1-3 Years): Routine Complex

Long Term (3-5 Years): Routine Complex

ACTION REQUESTED

- For Discussion Only
- Resolution
- Ordinance
- Motion

MOTION:

Staff: Todd Dowden, Finance Director

Date: February 12, 2024

Village of Bartlett
Finance Department Memo
24-01

DATE: February 12, 2024

TO: Paula Schumacher, Village Administrator

FROM: Todd Dowden, Finance Director
Dan Dinges, Public Works Director

SUBJECT: Water and Sewer Rate Review

Water and Sewer rates are reviewed each year during the budget process. The current water rate has been in effect since May 1, 2023. Sewer rates were last increased effective with the May 1, 2022 bills. The 3% water rate increase was in anticipation of the DuPage Water Commission rate increase and the meter changeout program. The sewer rate increases were for infrastructure improvements required at the wastewater treatment facility in DuPage County, the excess flow facility in Cook County, and for other rehabilitation projects throughout the collection system.

Water Charges

Based on the 4/30/24 estimated Water Fund balance, no increase in the rate is being proposed for the 24/25 fiscal year. The higher-than-expected fund balance is the result of an increase of about 3% in water consumption, increased interest income, and deferred projects. The 24/25 budget includes \$7,730,000 of capital improvements. Projects include water tower painting that was deferred from the prior year at a cost of \$1,355,000 and the meter changeout program at \$1.5 million, with \$500,000 coming from American Rescue Plan Act funds. Other capital projects include \$3.6 million for the bi-annual main replacement program, \$1.1 million for the Stearns Road pump improvements, \$250,000 for old infrastructure removal, and \$50,000 for the fire hydrant painting program. The proposed budget for capital improvements and debt service for previous projects accounts for 51% of the total. Using an estimated cost of \$5.60 per 1,000 gallons for purchasing water from the DuPage Water Commission, the cost of water would account for 44% of the current rate.

The water fund's cash balance at 4/30/24 is estimated to be \$9,672,870, which is above the policy balance. The balance at 4/30/25 is estimated to be \$3,970,168. This would be \$40,297 below the policy maximum balance when including 25% of the annual debt service and \$908,652 above the minimum balance. The Capital Improvement Plan for the 25/26 fiscal year includes \$2,840,000 to be used for the meter changeout program and other capital improvements. The projected 4/30/26 balance would be about \$2.5 million, which would be slightly below the minimum policy amount of \$3.1 million. The attached chart shows the projections through fiscal 27/28 with no increases to the rate and includes the projected Capital Improvement Plan project costs.

Sewer Charges

No sewer rate increases are being proposed as well. Increased revenue from charges for services and interest income, along with the use of American Rescue Plan Act (ARPA) funds have resulted in an estimated 4/30/24 balance of \$5,677,563. Capital projects have been funded with bond proceeds, an IEPA low interest loan, and ARPA funds. The 24/25 capital projects will be funded by \$500,000 from ARPA funds for the annual sewer rehabilitation and \$3,675,000 at the Bittersweet WWTP are being financed by low interest IEPA loans. The Devon Ave excess flow facility costs are being financed by \$3.6 million of bond proceeds and \$2 million of ARPA funds. Annual debt service payments for the WWTP are estimated to be just over \$2 million and will begin after the treatment plant is completed this summer. The proposed budget would have 31% of Cook County generated revenue to fund debt service for the Devon Avenue project. The DuPage County generated revenue would be 41% for prior IEPA loan payments and the new WWTP loan payment starting this year.

The fund's operating cash balance at 4/30/24 is estimated to be \$5,677,563, which would be over the maximum fund balance policy. The balance at 4/30/25 is estimated to decrease by \$901,332 to \$4,776,231 due to the first IEPA loan payments which are estimated to be over \$2 million annually on a \$37 million loan. The projected balances going forward will continue to decrease with a 04/30/27 projected balance of about \$2.4 million if rates are unchanged. On the next page is a chart of sewer rates for the three counties starting from January 1, 2012.

Sewer Rate History

	5/1/2012	5/1/2017	5/1/2018	5/1/2019	5/1/2022	Proposed 5/1/2024
Cook County						
Flat Fee	\$9.21	\$11.05	\$13.71	\$16.37	\$17.20	\$17.20
Per 1,000 gallons	\$0.77	\$0.92	\$1.14	\$1.36	\$1.43	\$1.43
Annual Increase		20.0%	24.1%	19.4%	5.1%	0.0%

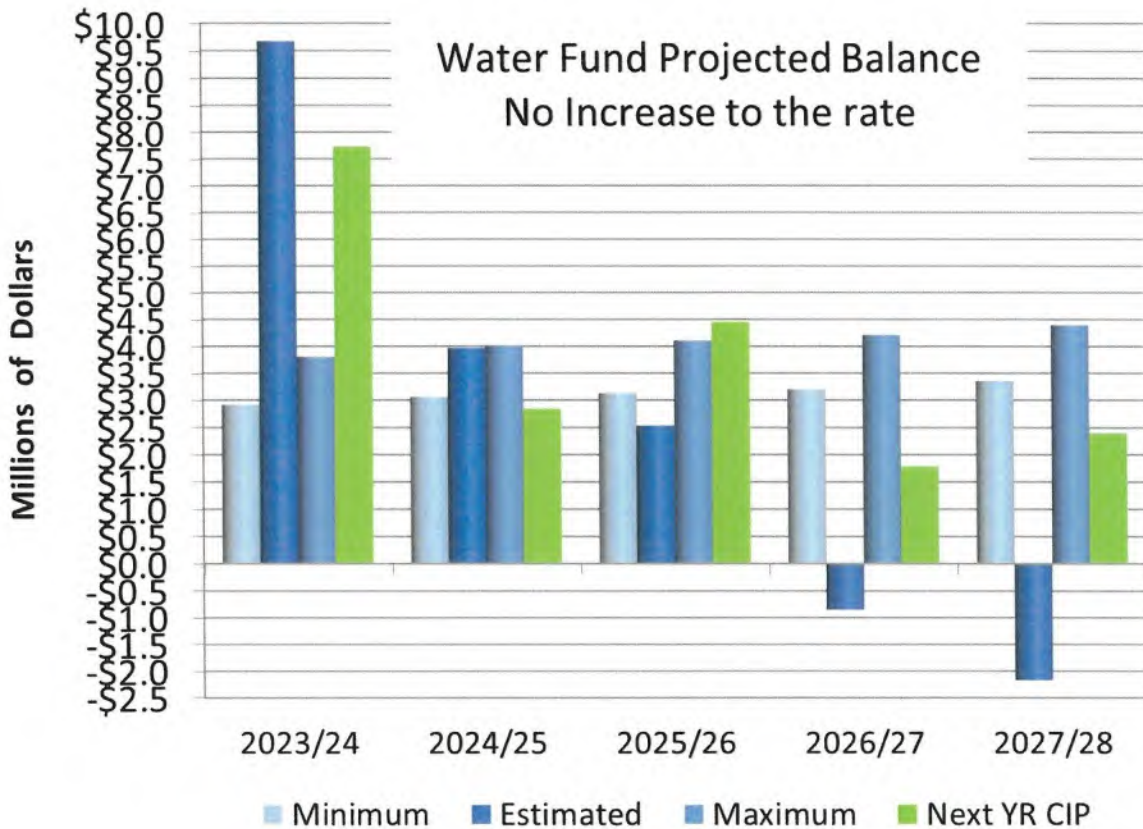
	5/1/2012	5/1/2017	5/1/2018	5/1/2019	5/1/2022	5/1/2024
DuPage County						
Flat Fee	\$10.85	\$13.02	\$16.94	\$20.86	\$22.66	\$22.66
Per 1,000 gallons	\$1.94	\$2.33	\$3.03	\$3.73	\$4.05	\$4.05
Annual Increase		20.0%	30.1%	23.1%	8.6%	0.0%

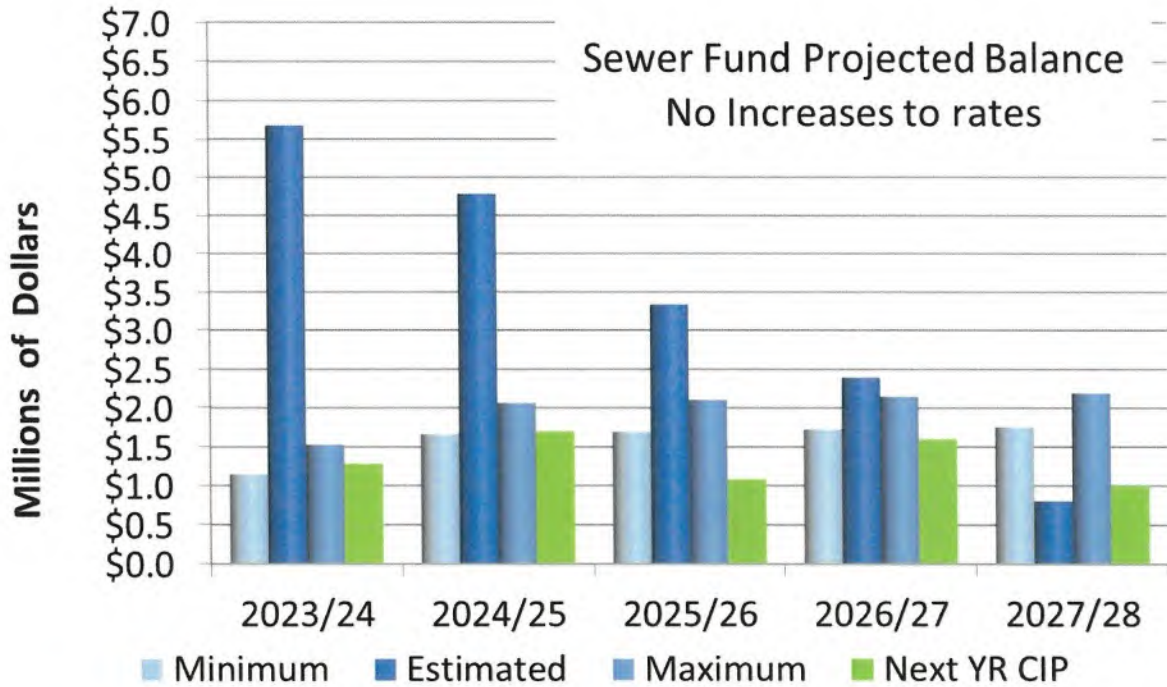
	5/1/2012	5/1/2017	5/1/2018	5/1/2019	5/1/2022	5/1/2024
Kane County						
Flat Fee	\$9.21	\$11.05	\$11.94	\$12.83	\$12.83	\$12.83
Per 1,000 gallons	\$0.77	\$0.92	\$0.99	\$1.06	\$1.06	\$1.06
Annual Increase		20.0%	8.1%	7.5%	0.0%	0.0%

Below is a chart that shows a monthly bill for 6,000 gallons of water.

Monthly Bill Fiscal 24/25 for 6,000 Gallons			
	Cook County	DuPage County	Kane County
	Current Charges	Current Charges	Current Charges
Water	\$75.60	\$75.60	\$75.60
Sewer	\$25.78	\$46.96	\$19.19
Total	\$101.38	\$122.56	\$94.79

A note on the April 1st bill will summarize the use of funds and direct residents to the village's Water & Sewer Services webpage where there will be updated details and a link to the interactive Capital Improvement Plan. To follow are fund balance projections showing no rate increases for water and sewer services.





**VILLAGE OF BARTLETT 2024/25 PROPOSED BUDGET
WATER FUND BALANCE PROJECTIONS**

Fund Balance Projections		Fund Balance Policy				
04/30/23 Cash Balance		8,571,711				
2023-24 Estimate		Minimum Balance		Maximum Balance		
Rev.	Charges for Services	13,265,000	25% of Operating Expenditures	2,226,909	35% of Operating Expenditures	3,117,673
	Connection Fees	160,000	Equipment Reserve	0	Equipment Reserve	0
	Interest Income	230,000	Radium Removal Reserve	180,590	Radium Removal Reserve	180,590
	Miscellaneous	110,000	25% of Annual Loan Payments	507,801	25% of Annual Loan Payments	507,801
	Transfer In	0	Minimum Balance	2,915,300	Maximum Balance	3,806,064
	Total Revenue	13,765,000				
Exp.	Operating	8,907,637				
	Capital Improvements	1,570,000	\$300K Mains, \$60K Infr Impr, \$1.5M Meter Change(\$500K ARPA), \$25K hydrants, \$185K old infra			
	Water tower paint	30,000				
	Leak Survey	125,000				
	DWC Buy-In	434,354				
	2021A Bonds (\$19M)	1,129,900				
	IEPA Loan (\$7.8M)	466,950				
	Total Expenditures	12,663,841				
	Excess (Deficiency)	1,101,159				
04/30/24 Estimated Balance		9,672,870	Over (Under) Minimum	6,757,570	Over (Under) Maximum	5,866,806
2024-25 Proposed		Minimum Balance		Maximum Balance		
Rev.	Charges for Services	13,275,000	25% of Operating Expenditures	2,372,375	35% of Operating Expenditures	3,321,324
	Connection Fees	125,000	Equipment Reserve	0	Equipment Reserve	0
	Interest Income	150,000	Radium Removal Reserve	180,590	Radium Removal Reserve	180,590
	Miscellaneous	1,000	25% of Annual Loan Payments	508,551	25% of Annual Loan Payments	508,551
	Transfer In	0	Minimum Balance	3,061,516	Maximum Balance	4,010,465
	Total Revenue	13,551,000				
Exp.	Operating	9,489,498	Proposed		0% increase	
	Capital Projects	6,250,000	\$3.6M Mains, \$1.35 Infr Impr, \$1.5M Meter Change(\$500K ARPA), \$50K hydrants, \$250K old infra			
	Water tower paint	1,355,000				
	Leak Survey	125,000				
	DWC Buy-In	434,354				
	2021A Bonds	1,132,900				
	IEPA Loan (\$7.8M)	466,950				
	Total Expenditures	19,253,702				
	Excess (Deficiency)	(5,702,702)				
04/30/25 Proposed Balance		3,970,168	Over (Under) Minimum	908,652	Over (Under) Maximum	(40,297)

**VILLAGE OF BARTLETT 2024/25 PROPOSED BUDGET
WATER FUND BALANCE PROJECTIONS**

Fund Balance Projections			Fund Balance Policy		
2025-26 Projected			Minimum Balance		Maximum Balance
Charges for Services	13,010,000	25% of Operating Expenditures	2,443,546	35% of Operating Expenditures	3,420,964
Connection Fees	100,000	Equipment Reserve	0	Equipment Reserve	0
Rev. Interest Income	100,000	Radium Removal Reserve	180,590	Radium Removal Reserve	180,590
Miscellaneous	1,000	25% of Annual Loan Payments	507,614	25% of Annual Loan Payments	507,614
Transfer In	0	Minimum Balance	3,131,750	Maximum Balance	4,109,168
Total Revenue	13,211,000				
				0% increase	
Operating	9,774,183	3% increase			
Capital Projects	1,750,000	\$200K Water Main, \$1.5M meter change, \$50K painting			
Water Tower Painting	965,000				
Exp. Leak Survey	125,000				
DWC Buy-In	434,354				
2021A Bonds	1,129,150				
IEPA Loan (\$7.8M)	466,950				
Total Expenditures	14,644,637				
Excess (Deficiency)	(1,433,637)				
04/30/26 Projected Balance	2,536,530	Over (Under) Minimum	(595,219)	Over (Under) Maximum	(1,572,637)
2026-27 Projected			Minimum Balance		Maximum Balance
Charges for Services	13,010,000	25% of Operating Expenditures	2,516,852	35% of Operating Expenditures	3,523,593
Connection Fees	100,000	Equipment Reserve	0	Equipment Reserve	0
Rev. Interest Income	50,000	Radium Removal Reserve	180,590	Radium Removal Reserve	180,590
Miscellaneous	5,501,000	25% of Annual Loan Payments	507,551	25% of Annual Loan Payments	507,551
Total Revenue	18,661,000	Minimum Balance	3,204,993	Maximum Balance	4,211,734
				0% increase	
Operating	10,067,408	3% increase			
Capital Projects	4,325,000	\$2.4M Water Main, \$1,500,000 meter change program, \$375K Infr removals, \$50K painting			
Capital Projects	5,500,000	1.5 million gallon elevated tank (IEPA loan)			
Leak Survey	125,000				
Exp. DWC Buy-In	434,354				
2021A Bonds	1,128,900				
IEPA Loan (\$7.8M)	466,950				
Total Expenditures	22,047,612				
Excess (Deficiency)	(3,386,612)				
04/30/27 Projected Balance	(850,082)	Over (Under) Minimum	(4,055,075)	Over (Under) Maximum	(5,061,816)

**VILLAGE OF BARTLETT 2024/25 PROPOSED BUDGET
WATER FUND BALANCE PROJECTIONS**

Fund Balance Projections		Fund Balance Policy			
2027-28 Projected		Minimum Balance		Maximum Balance	
Charges for Services	13,010,000	25% of Operating Expenditures	2,592,358	35% of Operating Expenditures	3,629,301
Connection Fees	100,000	Equipment Reserve	0	Equipment Reserve	0
Rev. Interest Income	50,000	Radium Removal Reserve	180,590	Radium Removal Reserve	180,590
Miscellaneous	1,000	25% of Annual Loan Payments	<u>583,301</u>	25% of Annual Loan Payments	<u>583,301</u>
Transfer In	0	Minimum Balance	3,356,249	Maximum Balance	4,393,192
Total Revenue	<u>13,161,000</u>				
				0% increase	
Operating	10,369,430	3% increase			
Capital Projects	1,655,000	\$200K Water Main, \$1.405M Tower painting, \$50K hydrant painting			
Leak Survey	125,000				
Exp. DWC Buy-In	434,354				
2021A Bonds	1,131,900				
IEPA Loan (\$7.8M)	466,950				
IEPA Loan (\$5M)	<u>300,000</u>	Water tower loan estimate			
Total Expenditures	<u>14,482,634</u>				
Excess (Deficiency)	(1,321,634)				
04/30/28 Projected Balance	(2,171,717)	Over (Under) Minimum	(5,527,966)	Over (Under) Maximum	(6,564,909)

VILLAGE OF BARTLETT CAPITAL IMPROVEMENTS PROGRAM 2024-2028

Water Projects by Year

Project	Page	FY 2023-24	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28	Five Year
Water Main Replacement	4	\$ 300,000	\$ 3,600,000	\$ 200,000	\$ 2,400,000	\$ 200,000	\$ 6,700,000
Water Tower Painting	6	30,000	1,355,000	965,000	0	1,405,000	3,755,000
Infrastructure Improvements with Water Transition	8	60,000	1,350,000	0	5,500,000		6,910,000
Watermain Leak Survey and Leak Repairs	10	125,000	125,000	125,000	125,000	125,000	625,000
Water Meter Changeout	12	1,500,000	1,500,000	1,500,000	1,500,000		6,000,000
Infrastructure Removals	14	185,000	250,000		375,000		810,000
Hydrant Painting Program	16	25,000	50,000	50,000	50,000	50,000	225,000
Total		\$ 2,225,000	\$ 8,230,000	\$ 2,840,000	\$ 9,950,000	\$ 1,780,000	\$ 25,025,000

Sources of Funds	FY 2023-24	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28	Five Year Total
Water Fund	\$ 1,725,000	\$ 7,730,000	\$ 2,840,000	\$ 4,450,000	\$ 1,780,000	\$ 18,525,000
IEPA Loans				5,500,000		5,500,000
ARPA Funds	500,000	500,000				1,000,000
Total	\$ 2,225,000	\$ 8,230,000	\$ 2,840,000	\$ 9,950,000	\$ 1,780,000	\$ 25,025,000

**VILLAGE OF BARTLETT 2024/25 PROPOSED BUDGET
SEWER FUND BALANCE PROJECTIONS**

Fund Balance Projections		Fund Balance Policy			
04/30/23 Cash Balance		3,520,474	*Cash balance does not include 2019 bond proceeds and \$4M in payables at 4/30/23		
2023-24 Estimate					
	Charges for Services	7,269,000	Minimum Balance		Maximum Balance
	Connection Fees	95,000	25% of Operating Expenditures	969,439	35% of Operating Expenditures 1,357,214
Rev.	Interest Income	320,000	Equipment Reserve		Equipment Reserve 0
	Misc	<u>17,392,179</u>	25% of Annual Loan Payments	<u>173,575</u>	25% of Annual Loan Payments <u>173,575</u>
	Total Revenue	25,076,179	Minimum Balance	1,143,014	Maximum Balance 1,530,789
	Operating	3,877,754	Debt Service listed separately		\$0 additional revenue, \$1M recovery
	Capital Projects	979,857	\$1M rehabilitation(\$1M ARPA), \$900K lift station, \$79,857 plan update		
Exp.	Devon Excess Flow	5,650,000			
	Bittersweet WWTP	11,717,179			
	Devon Debt(\$8.5)	557,150			
	IEPA Debt 2014	<u>137,150</u>			
	Total Expenditures	22,919,090			
	Excess (Deficiency)	2,157,089			
04/30/24 Estimated Balance		5,677,563	Over (Under) Minimum	4,534,549	Over (Under) Maximum 4,146,774
2024-25 Proposed					
	Charges for Services	6,820,000	Minimum Balance		Maximum Balance
	Connection Fees	80,000	25% of Operating Expenditures	986,633	35% of Operating Expenditures 1,381,286
Rev.	Interest Income	120,000	Equipment Reserve		Equipment Reserve 0
	Miscellaneous	<u>7,300,000</u>	25% of Annual Loan Payments	<u>679,950</u>	25% of Annual Loan Payments <u>679,950</u>
	Total Revenue	14,320,000	Minimum Balance	1,666,583	Maximum Balance 2,061,236
	Operating	3,946,532	Debt Service listed separately		\$0 additional revenue, \$2.5M recovery
	Capital Projects	680,000	\$1M rehabilitation(\$500KARPA), \$180K lift station,		
	Devon Excess Flow	3,600,000	\$2M ARPA		
Exp.	Bittersweet WWTP	4,275,000	\$600,000 from Sewer Fund		
	Devon Debt(\$8.5M)	552,650			
	WWTP (\$37M)	2,030,000	\$2.03M estimated annual payment starting fall of 2024		
	IEPA Debt 2014	<u>137,150</u>			
	Total Expenditures	15,221,332			
	Excess (Deficiency)	(901,332)			
04/30/25 Proposed Balance		4,776,231	Over (Under) Minimum	3,109,648	Over (Under) Maximum 2,714,995

**VILLAGE OF BARTLETT 2024/25 PROPOSED BUDGET
SEWER FUND BALANCE PROJECTIONS**

Fund Balance Projections			Fund Balance Policy		
2025-26 Projected					
	Charges for Services	6,820,000	Minimum Balance		Maximum Balance
Rev.	Connection Fees	80,000	25% of Operating Expenditures	1,016,232	35% of Operating Expenditures
	Interest Income	120,000	Equipment Reserve		Equipment Reserve
	Miscellaneous	25,000	25% of Annual Loan Payments	679,950	25% of Annual Loan Payments
	Total Revenue	7,045,000	Minimum Balance	1,696,182	Maximum Balance
					2,102,675
	Operating	4,064,928	Added 3% to prior yr		\$0 additional revenue, \$0 recovery
	Capital Projects	1,700,000	\$1M rehabilitation, \$700K lift station		
Exp.	Bittersweet WWTP	0			
	Devon Debt(\$8.5M)	552,650			
	WWTP (\$37M)	2,030,000	\$2.03M estimated annual payment starting fall of 2024		
	IEPA Debt 2014	137,150			
	Total Expenditures	8,484,728			
	Excess (Deficiency)	(1,439,728)			
04/30/26 Projected Balance		3,336,503	Over (Under) Minimum	1,640,321	Over (Under) Maximum
					1,233,828
2026-27 Projected					
	Charges for Services	6,820,000	Minimum Balance		Maximum Balance
Rev.	Connection Fees	80,000	25% of Operating Expenditures	1,046,719	35% of Operating Expenditures
	Interest Income	120,000	Equipment Reserve		Equipment Reserve
	Miscellaneous	25,000	25% of Annual Loan Payments	681,013	25% of Annual Loan Payments
	Total Revenue	7,045,000	Minimum Balance	1,727,732	Maximum Balance
					2,146,420
	Operating	4,186,876	Added 3% to prior yr		\$0 additional revenue
	Capital Projects	1,080,000	\$1M rehabilitation, \$80K lift station		
Exp.	Devon Debt(\$8.5M)	556,900			
	WWTP (\$37M)	2,030,000			
	IEPA Debt 2014	137,150			
	Total Expenditures	7,990,926			
	Excess (Deficiency)	(945,926)			
04/30/27 Projected Balance		2,390,577	Over (Under) Minimum	662,846	Over (Under) Maximum
					244,158

**VILLAGE OF BARTLETT 2024/25 PROPOSED BUDGET
SEWER FUND BALANCE PROJECTIONS**

Fund Balance Projections		Fund Balance Policy			
2027-28 Projected					
	Charges for Services	6,820,000	Minimum Balance		Maximum Balance
	Connection Fees	80,000	25% of Operating Expenditures	1,078,121	35% of Operating Expenditures 1,509,369
Rev.	Interest Income	120,000	Equipment Reserve		Equipment Reserve 0
	Miscellaneous	25,000	25% of Annual Loan Payments	680,575	25% of Annual Loan Payments 680,575
	Total Revenue	7,045,000	Minimum Balance	1,758,696	Maximum Balance 2,189,944
	Operating	4,312,482	Added 3% to prior yr		\$0 additional revenue
	Capital Projects	1,600,000	\$1M rehabilitation, \$600K lift station		
Exp.	Devon Debt(\$8.5M)	555,150			
	WWTP (\$37M)	2,030,000			
	IEPA Debt 2014	137,150			
	Total Expenditures	8,634,782			
	Excess (Deficiency)	(1,589,782)			
04/30/28 Projected Balance		800,795	Over (Under) Minimum	(957,901)	Over (Under) Maximum (1,389,149)

VILLAGE OF BARTLETT CAPITAL IMPROVEMENTS PROGRAM 2024-2028

Sewer Projects by Year

<i>Project</i>	<i>Page</i>	<i>FY 2023-24</i>	<i>FY 2024-25</i>	<i>FY 2025-26</i>	<i>FY 2026-27</i>	<i>FY 2027-28</i>	<i>Five Year Total</i>
<i>Facility Plan Update/Phosphorous Removal</i>	19	\$ 79,857					\$ 79,857
<i>Sanitary Sewer System Rehabilitation</i>	21	1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	5,000,000
<i>Devon Excess Flow Plant Rehabilitation</i>	23	5,650,000	5,600,000				11,250,000
<i>Lift Station Upgrades and Rehabilitation</i>	25	900,000	180,000	700,000	80,000	600,000	2,460,000
<i>Bittersweet WWTP Facility Plan Improvements</i>	27	11,717,179	4,275,000				15,992,179
<i>Total</i>		\$ 19,347,036	\$ 11,055,000	\$ 1,700,000	\$ 1,080,000	\$ 1,600,000	\$ 34,782,036

<i>Sources of Funds</i>	<i>FY 2023-24</i>	<i>FY 2024-25</i>	<i>FY 2025-26</i>	<i>FY 2026-27</i>	<i>FY 2027-28</i>	<i>Five Year Total</i>
<i>Sewer Fund</i>	\$ 979,857	\$ 1,280,000	\$ 1,700,000	\$ 1,080,000	\$ 1,600,000	\$ 6,639,857
<i>2019 Bonds</i>	5,650,000	3,600,000				9,250,000
<i>American Rescue Plan Act</i>	1,000,000	2,500,000				3,500,000
<i>IEPA Low Interest Rate Loan</i>	11,717,179	3,675,000				15,392,179
<i>Total</i>	\$ 19,347,036	\$ 11,055,000	\$ 1,700,000	\$ 1,080,000	\$ 1,600,000	\$ 34,782,036



WELCOME

**2024/2025
PROPOSED BUDGET
PRESENTATION**

Village of Bartlett Budget “More Than Just The Numbers”

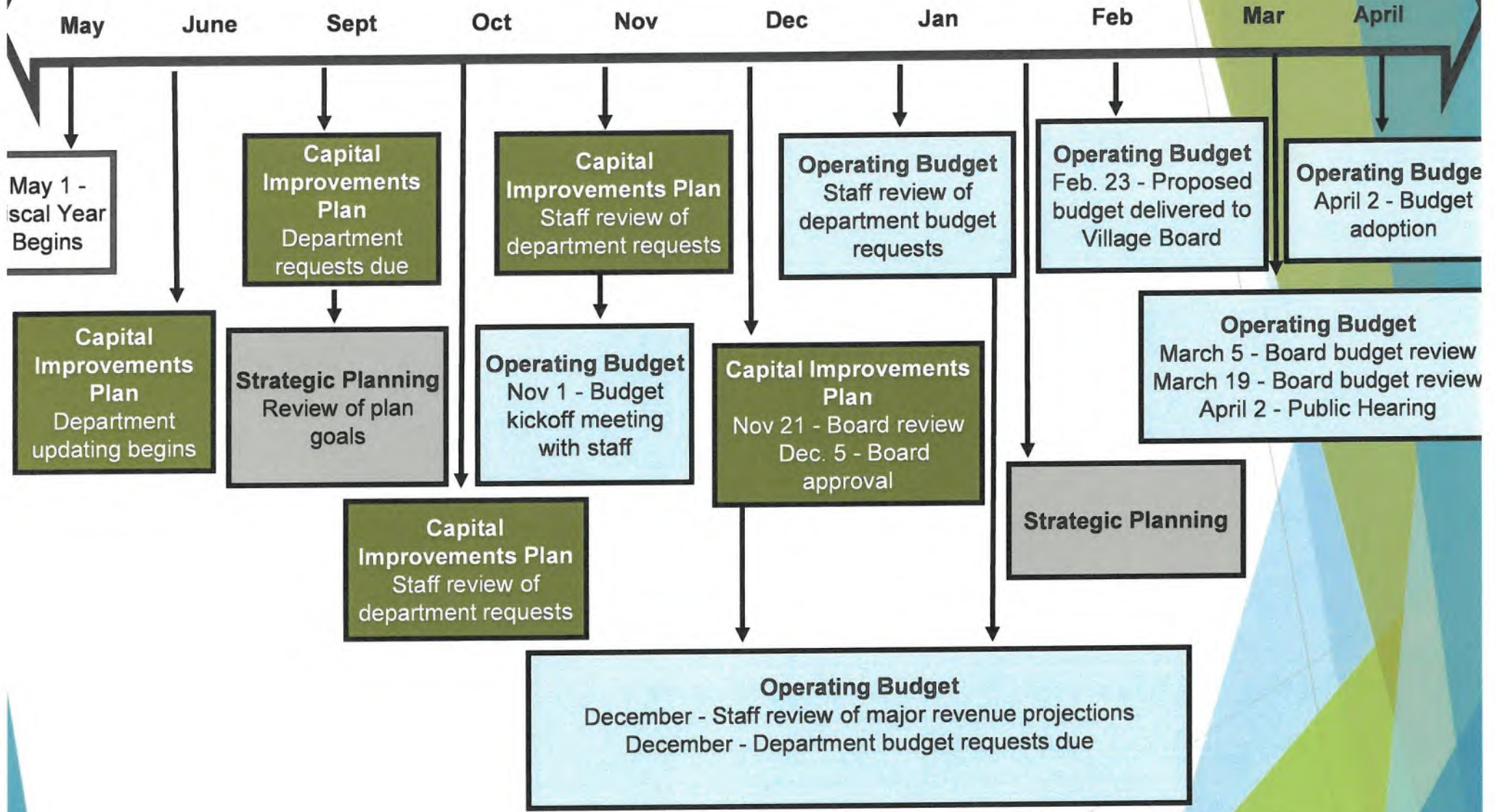
- **The Budget is a Policy Document**
 - Village Wide - Long Term Financial Policies
 - Village Wide - Non-Financial Goals and Objectives (Strategic Plan)
 - Clearly Stated Goals and Objectives (Departments)
- **The Budget is a Financial Plan**
 - Summarizes Major Revenues and Expenditures
 - Describes Major Revenues
 - Projects Major Changes in Fund Balance

Village of Bartlett Budget “More Than Just The Numbers”

- **The budget is an operation guide**
 - The budget describes activities, services and function of the village
 - Budget includes an organizational chart
 - Budget includes a personnel summary

- **The budget is a communication device**
 - Defines who develops, prepares, reviews and adopts budget
 - Provides a detailed budget message to board of trustees
 - Defines financial polices (Fund Balance) and long term capital planning (Capital Improvement Plan)
 - Budget includes statistical data to convey long term information to the public

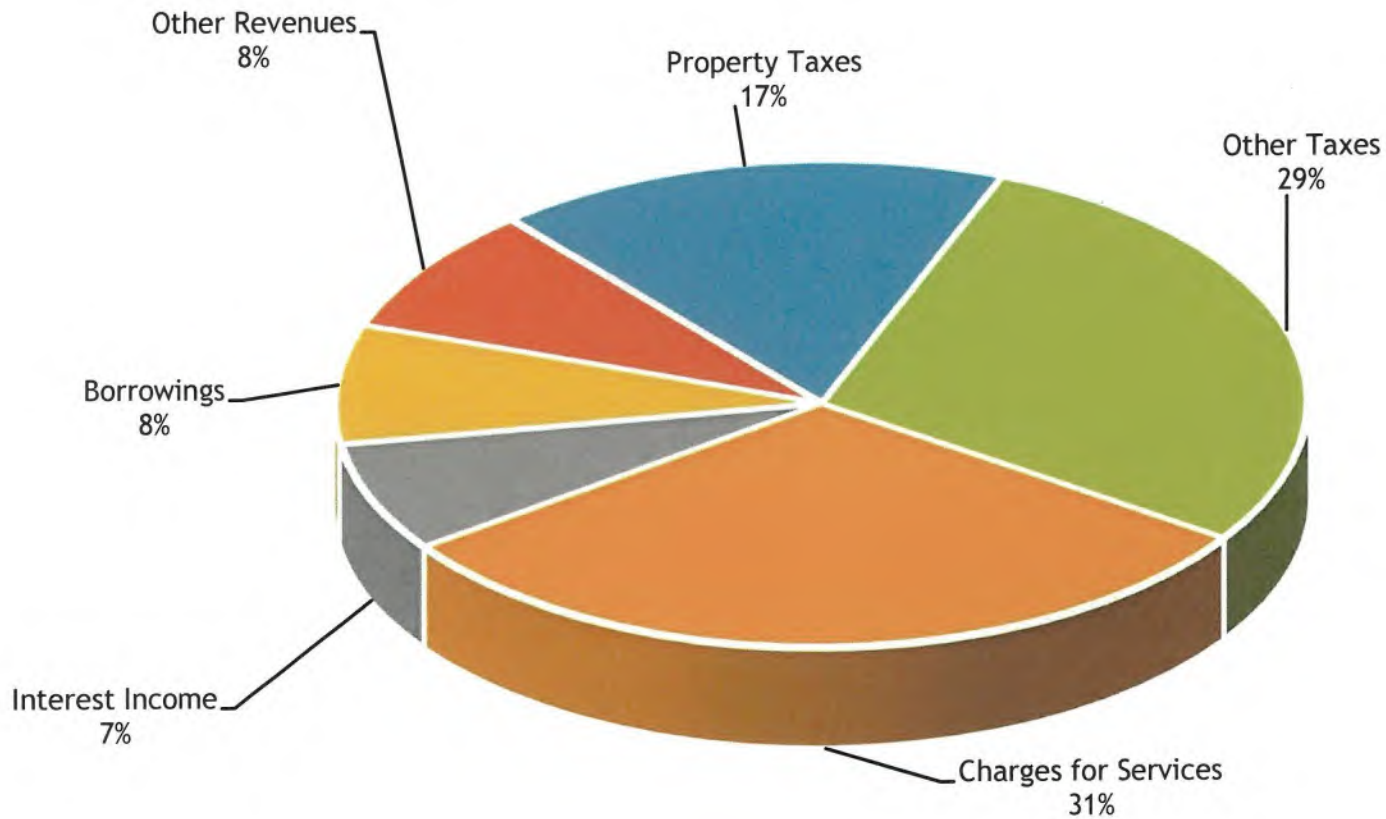
Budget Calendar



- Strategic Planning process
- Operating Budget process
- Capital Budget process

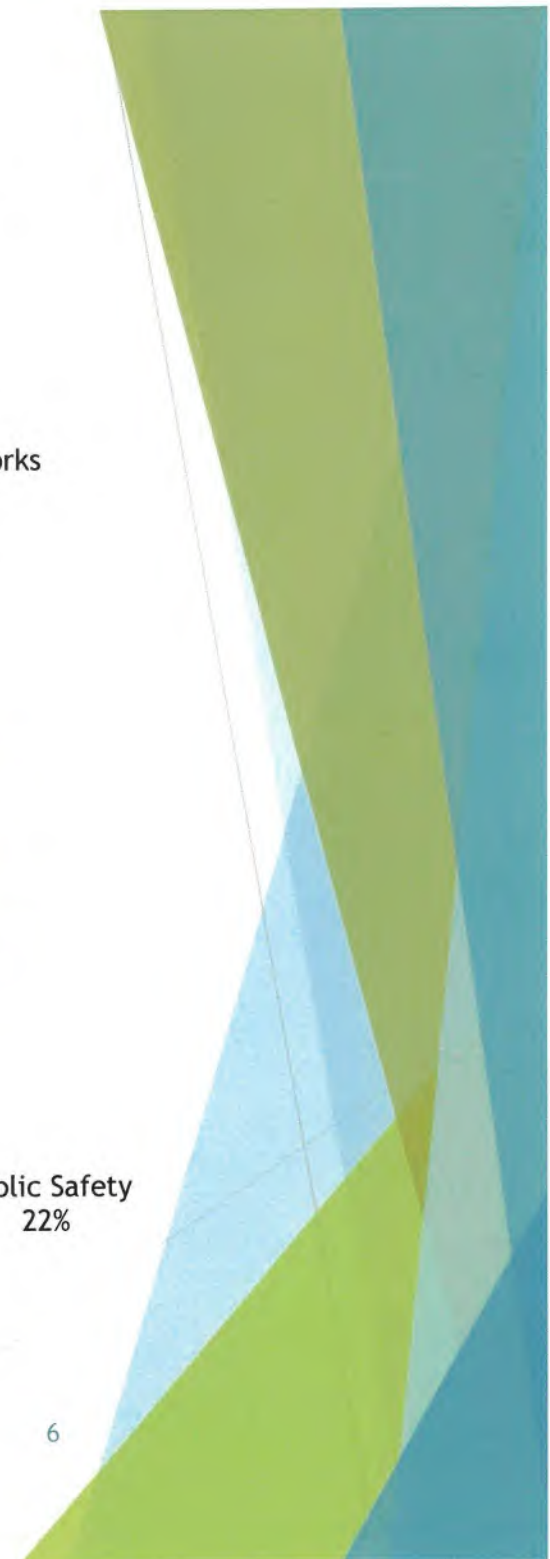
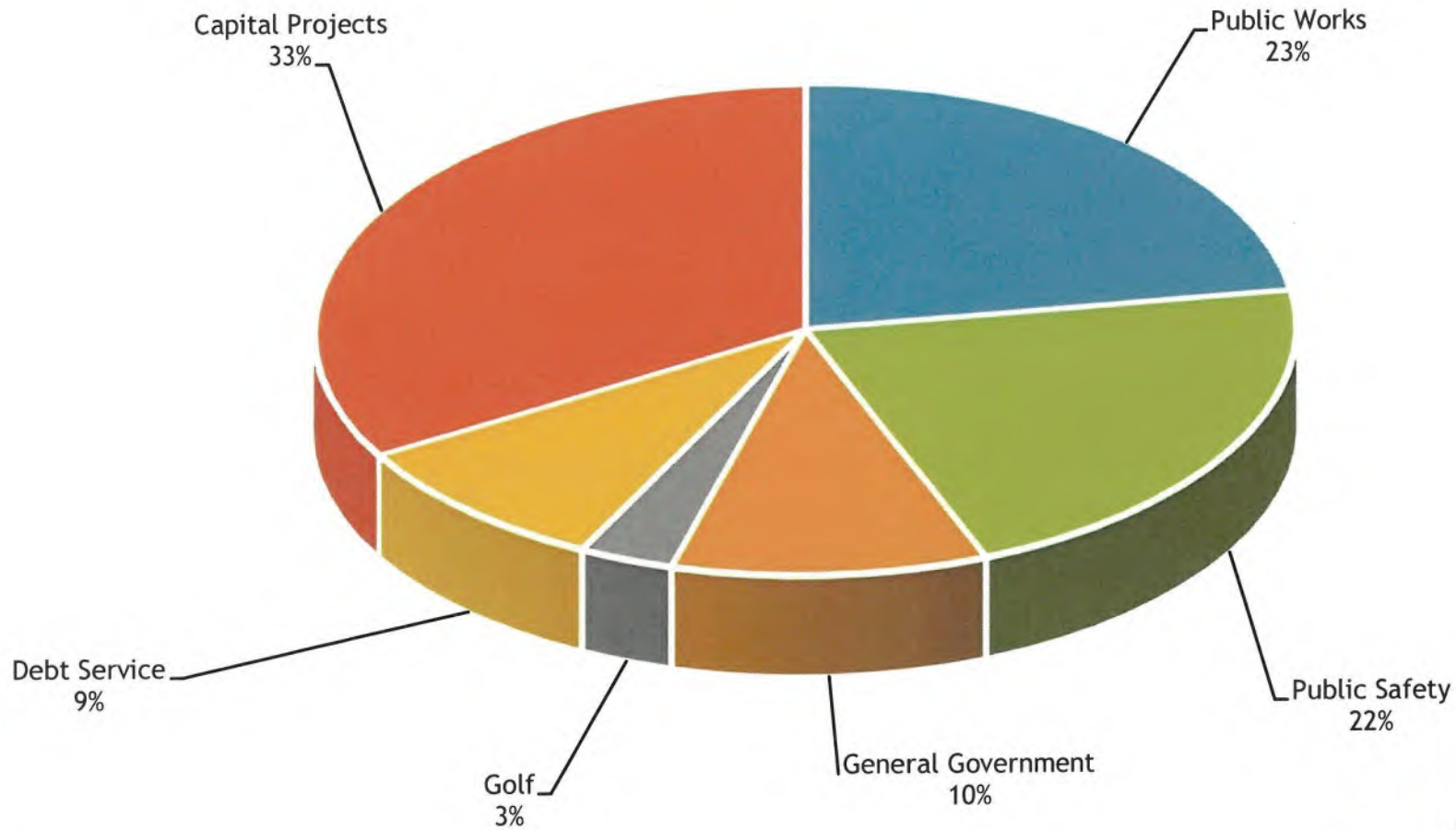
“Where the Money Comes From”

Total Revenue: \$75,296,465

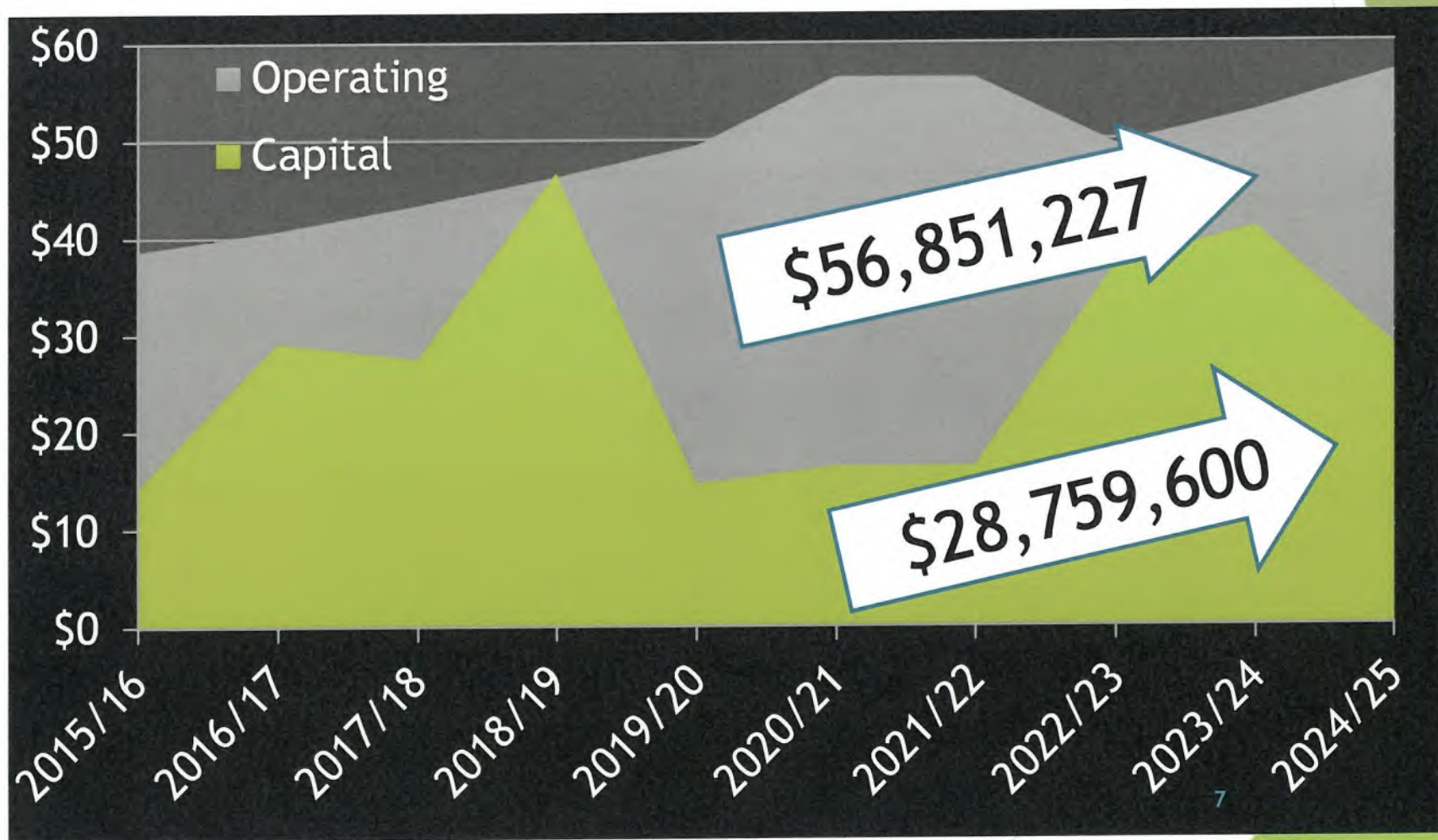


“Where the Money Goes”

Total Expenditures: \$85,610,827



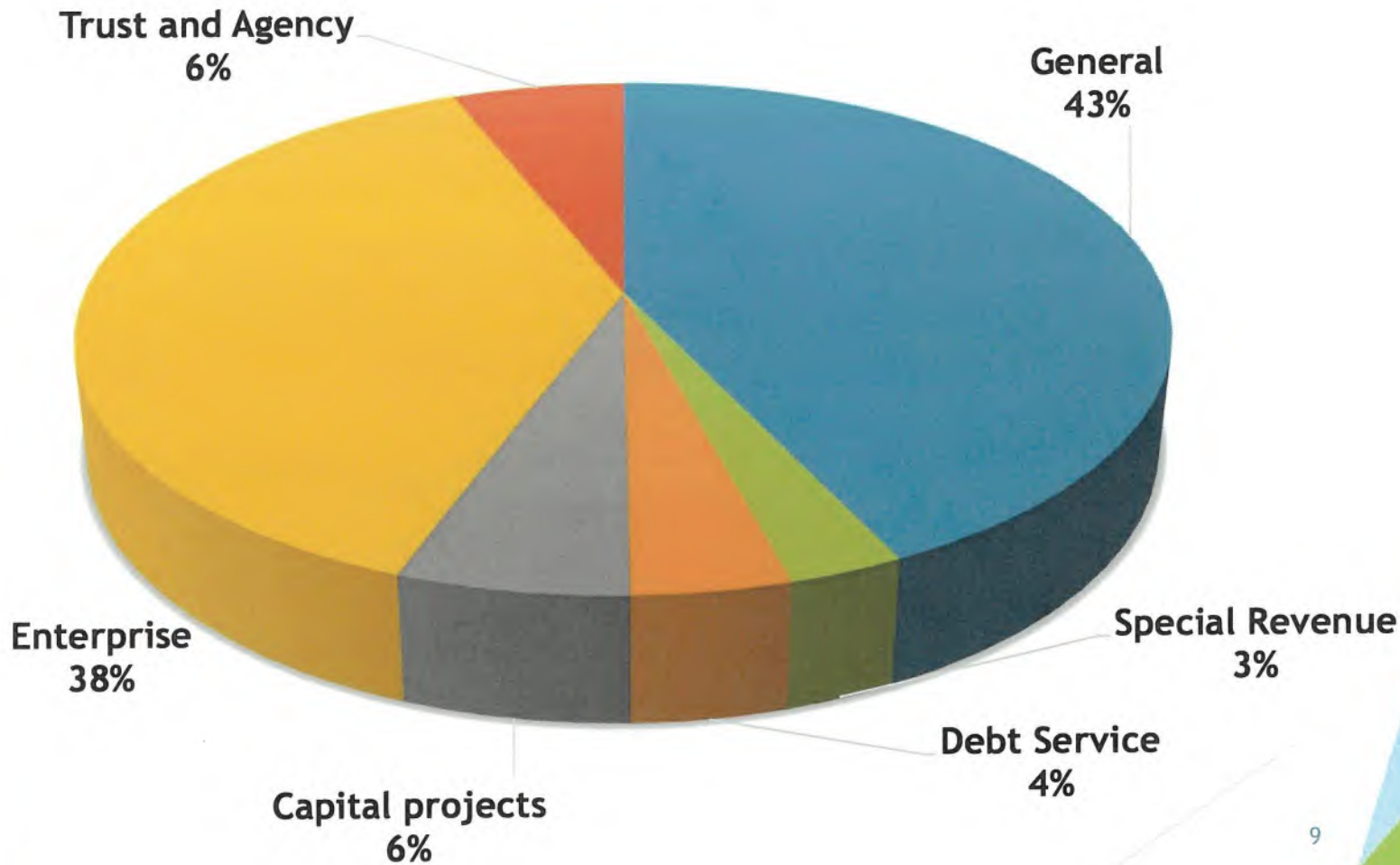
Operating vs. Capital Expenditures



Village of Bartlett FY 2024/25 Revenue Review

Revenue by Fund

Proposed = \$75,296,465 (net of transfers)
22% decrease from 23/24 Budget



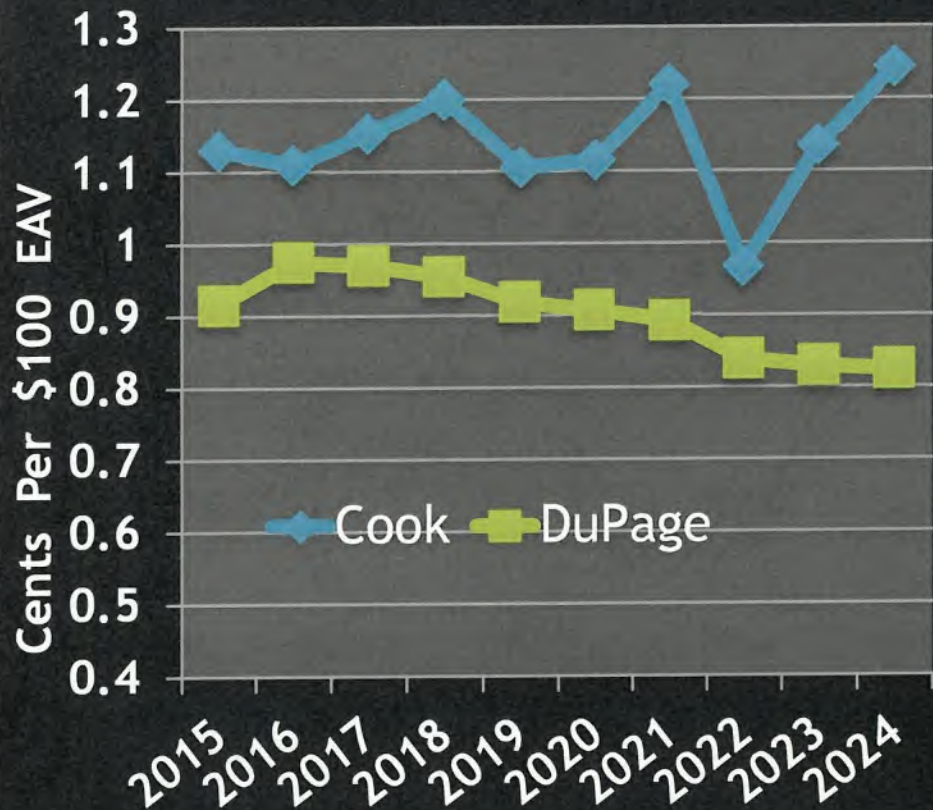
FY 2025 Revenue Review

‡ Property Taxes

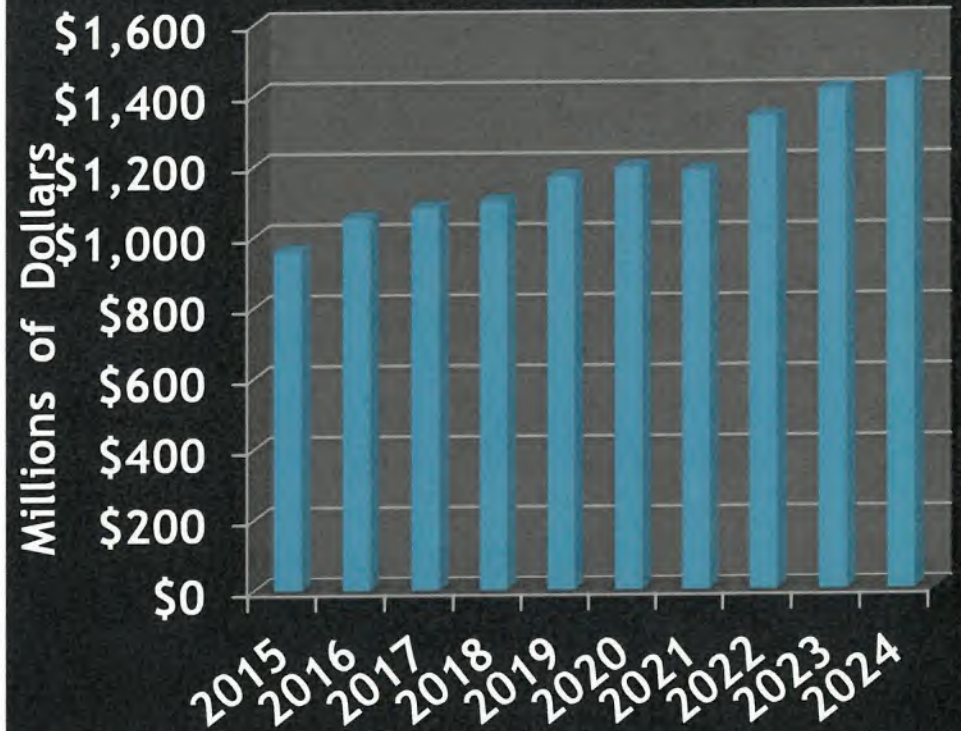
- \$12,870,519
 - 17% of total revenue, 31% of General Fund
 - \$474,000 increase from FY23/24 Budget from increased 2023 Police Pension levy
 - 4% increase from FY23/24 Budget
1. No change to the 2024 General levy after added \$750,000 the prior year to capture taxable value from Brewster Creek TIF closing
 2. 2024 Police Pension contribution is estimated to be about \$3.5 million if no changes are made to the pension laws
 3. Village's share of total property tax has been about 10%
 4. EAV is projected to increase about 2%
 5. Estimated Cook rate = 1.24/\$100 - Estimated DuPage rate = .83/\$100.

Property Tax Rates and EAV

Tax Rate History

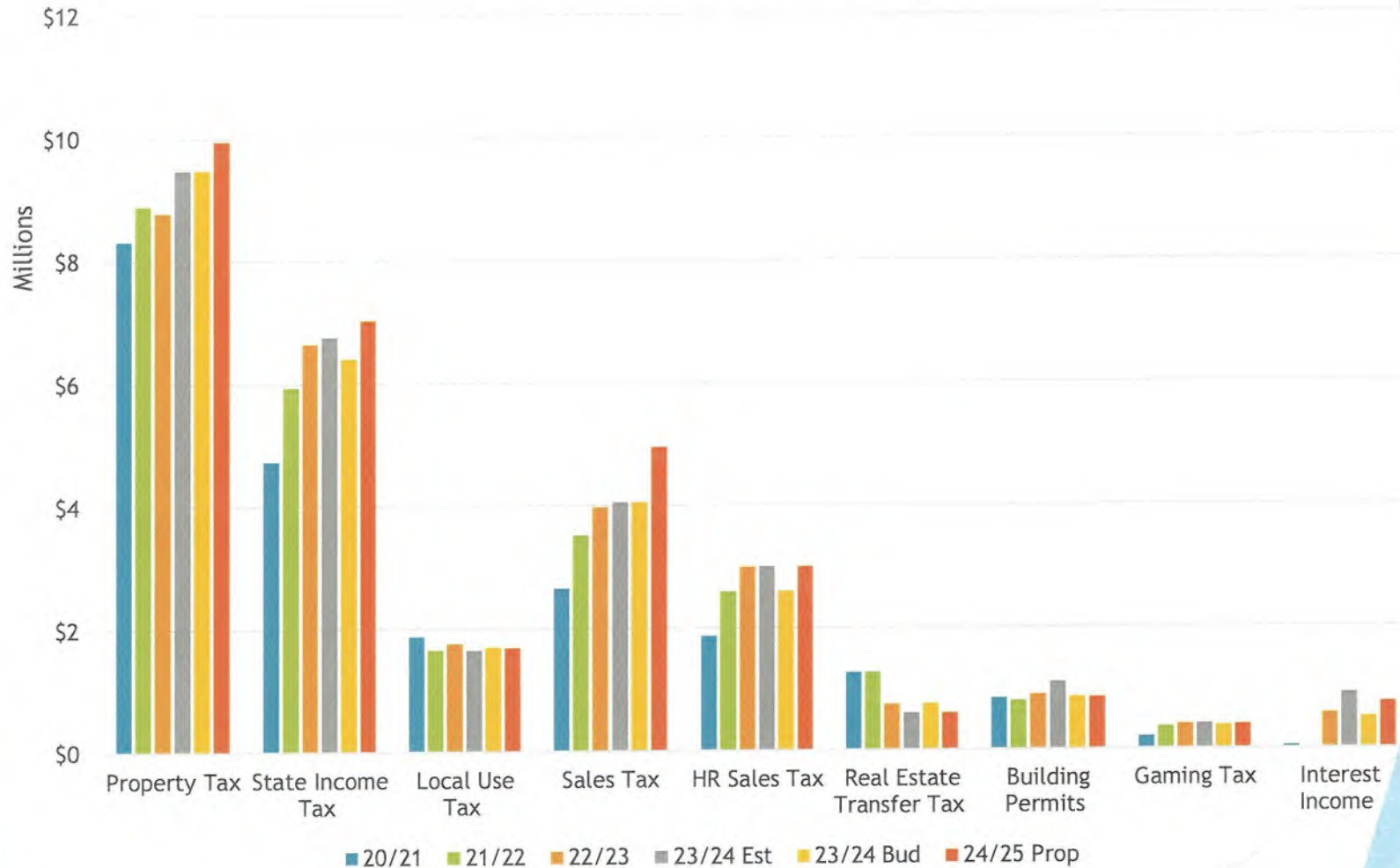


Equalized Assessed Value



FY 2025 Revenue Review

General Fund Major Revenue



FY 2025 Revenue Review

‡ Other Taxes - Income Tax

- \$7,025,000
- 7% of total revenue, 21% of General Fund
- \$625,000 increase from FY23/24 Budget
- 10% increase from FY23/24 Budget

1. Village receives revenue based on per capita rate and population of 41,105. IML's estimate for FY 2025 = \$171.00 per capita. The FY 2024 estimate was \$350,000 low.
2. The IML is assuming the state doesn't change the LGDF rate.
3. State of Illinois rate is 4.95% and municipalities receive 6.47% of this

FY 2025 Revenue Review

‡ Other Taxes - Local Use Tax

- \$1,700,000
- 2% of total revenue, 5% of General Fund
- No change from FY23/24 Budget

1. Village receives revenue based on per capita rate and population of 41,105. IML latest update = \$42.18
2. Online tax collections are distributed as sales tax starting with January 2021 activity.

FY 2025 Revenue Review

‡ Other Taxes - Sales Tax

- \$4,950,000
 - 6% of total revenue, 15% of General Fund
 - \$900,000 increase from FY23/24 Budget
 - 22% increase from FY23/24 Budget
1. Village receives 1% tax of the 6.25% state rate on purchases made within the village
 2. Sales tax sharing agreements are reflected as expenditures in Administration department's budget entitled "Economic Incentives"
 3. Increase reflects a full year of the new car dealerships and Aldi's. Both businesses have sales tax rebate agreements

FY 2025 Revenue Review

‡ Other Taxes - Home Rule Sales Tax

- \$3,000,000
 - 4% of total revenue, 9% of General Fund
 - \$400,000 increase from FY23/24 Budget
 - 15% increase from FY23/24 Budget
1. Village receives 1% tax on general merchandise purchases made within the village and starting January 2021 on some online purchases delivered to Bartlett
 2. Tax is collected by the state and distributed to the municipalities
 3. The Home Rule tax began July 2018

FY 2025 Revenue Review

‡ Other Taxes - Real Estate Transfer Tax

- \$600,000
 - 1% of total revenue, 2% of General Fund
 - \$150,000 decrease from FY23/24 Budget
 - 20% decrease from FY23/24 Budget
1. Commercial property sales have continued to be slower over the past year. Only one sale resulting in a tax over \$100,000.
 2. Average sale price of a residential home was up about 2% to \$374,000.

FY 2025 Revenue Review

‡ Other Revenue - Development/Building Permits

- \$850,000
 - 1% of total revenue, 3% of General Fund
 - No increase from FY23/24 Budget
-
1. Projected number of new residential permits is 70, up from an estimated 40 this year and 7 new commercial permits
 2. The increase in the residential permits is from the Grasslands development
 3. 2,800 miscellaneous permits are projected and are estimated to account for about 50% of the permit revenue

FY 2025 Revenue Review

‡ Other Taxes - Gaming Tax

- \$400,000
 - 0.5% of total revenue, 1% of General Fund
 - \$25,000 increase from FY23/24 Budget
 - 7% increase from FY23/24 Budget
1. Revenue is used to fund economic incentives
 2. Estimate for FY23/24 is \$410,000

FY 2025 Revenue Review

‡ Gen Fund Misc Income - Interest

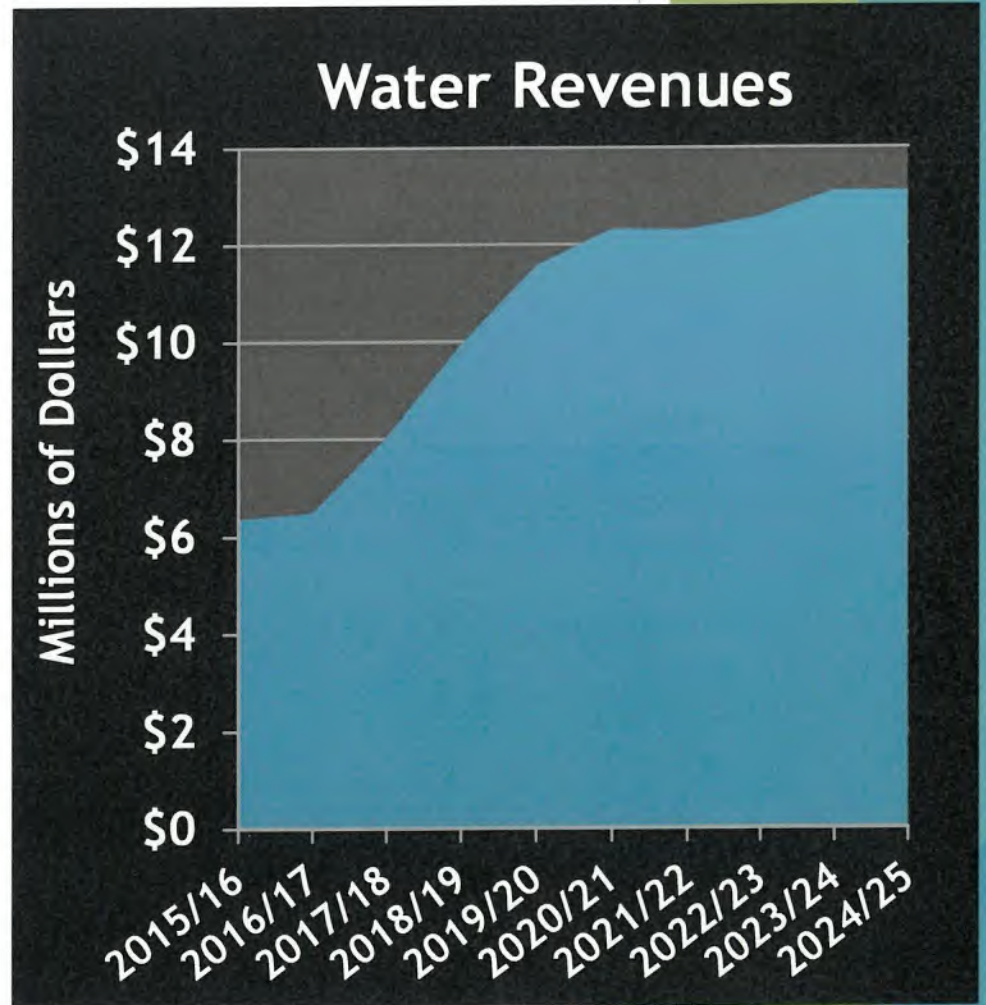
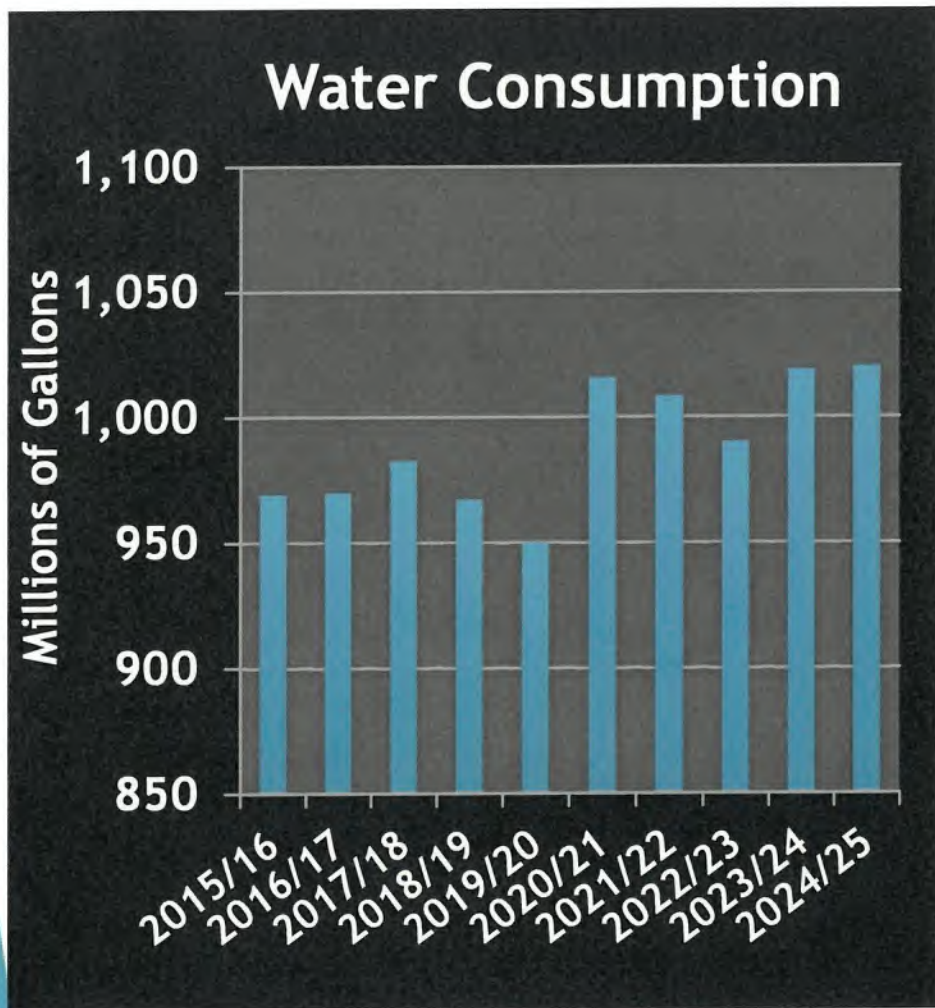
- \$750,000
 - 1% of total revenue, 3% of General Fund
 - \$250,000 increase from FY24/24 Budget
 - 50% increase from FY23/24 Budget
1. Interest revenue has grown significantly over the last two years. FY21/22 interest received was \$12,605
 2. Estimate for FY23/24 is \$900,000

FY 2025 Revenue Review

‡ Service Charges - Water Sales

- \$13,225,000
 - 17% of total revenue
 - \$265,000 increase from FY23/24 Budget
 - 2% increase from FY23/24 Budget
1. Revenue is based upon consumption history with no proposed rate increase
 2. Average residential monthly water bill in proposed budget is \$75.60 based upon 6,000 gallons of usage per month
 3. The last rate increase was effective May 1, 2023
 4. Rates will continue to be reviewed as capital improvements are completed and consumption changes

Water Revenue and Consumption History



FY 2025 Revenue Review

‡ Service Charges - Sewer Sales

- \$6,750,000
 - 9% of total revenue
 - \$200,000 increase from FY23/24 Budget
 - 3% increase from FY23/24 Budget
1. Debt service on WWTP loans expected to begin the fall of 2024 as construction is substantially completed
 2. Commercial surcharge fees and fines are expected to decrease
 3. Average residential monthly sewer bill by county based on 6,000 gallons:
 - a) Cook = \$25.78/month
 - b) DuPage = \$46.96/month
 - c) Kane = \$19.19/month

FY 2025 Revenue Review

‡ Service Charges - Golf

- \$1,647,500
 - 2% of total revenue
 - \$103,000 increase from FY23/24 Budget
 - 7% increase from FY23/24 Budget
1. Proposed budget projects 32,500 rounds of golf, the same amount as the FY 2023/24 budget.
 2. Proposed revenue budget is about 7% above 23/24 estimate
 3. Pro shop sales are budgeted at \$94,000, up 2%

FY 2025 Revenue Review

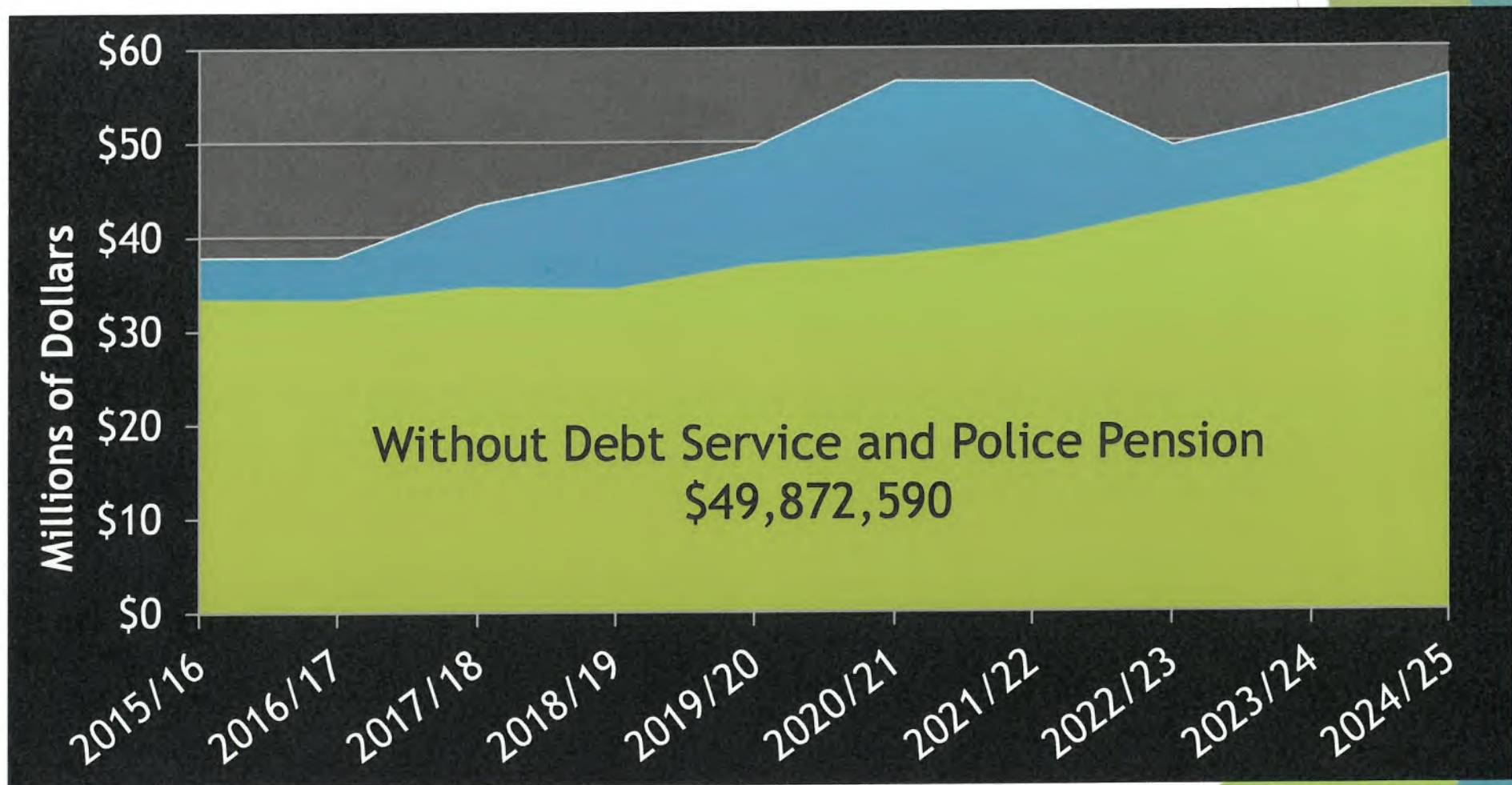
‡ Service Charges - Food and Beverage

- \$1,228,000
 - 1.6% of total revenue
 - \$69,000 increase from FY23/24 Budget
 - 6% increase from FY23/24 Budget
1. Actual revenue for 23/24 is projected to be \$1,160,000.
 2. The budget reflects the number of events already booked for next year

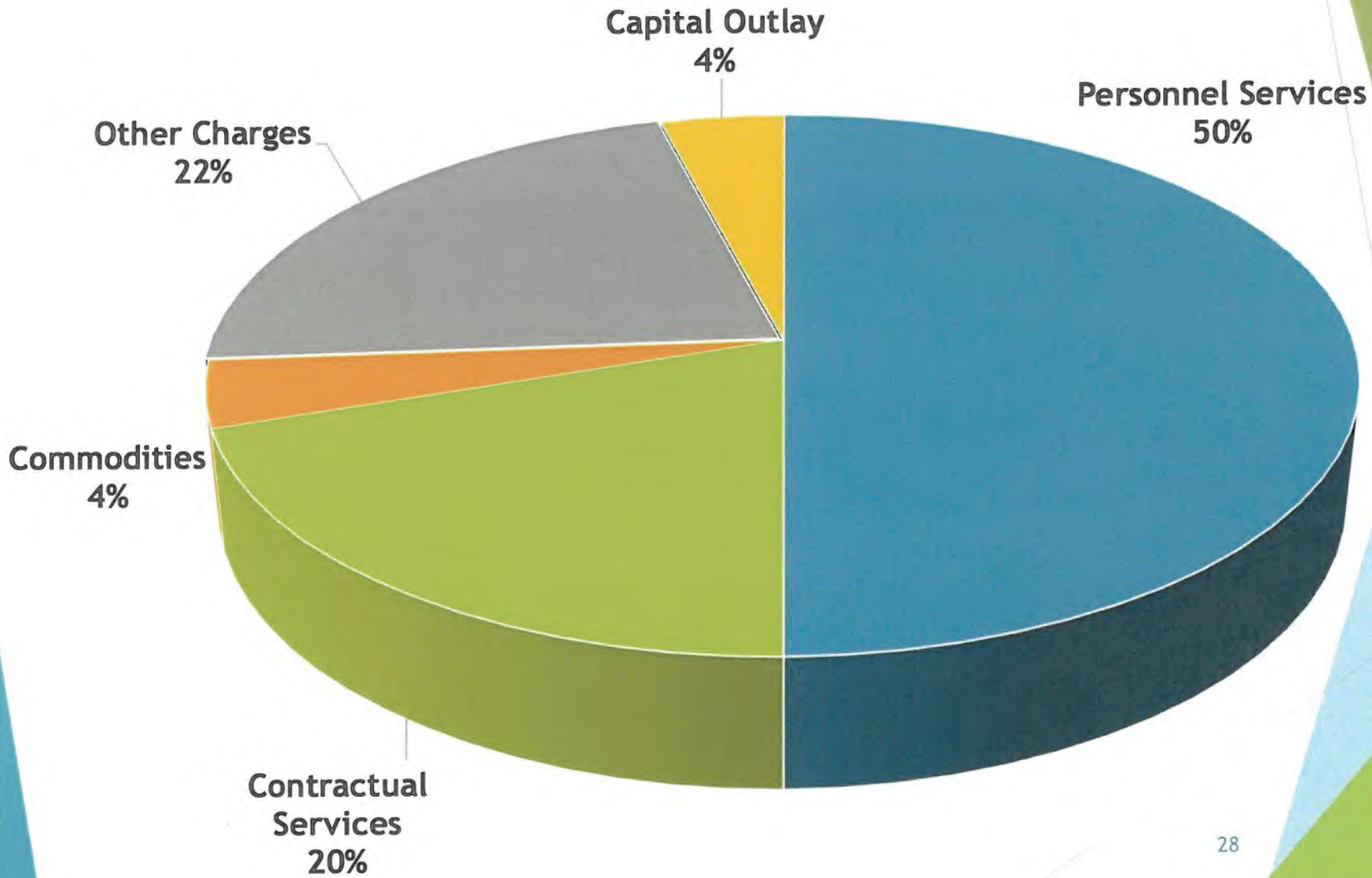
Village of Bartlett FY 2024/25 Expenditure Review

Operating Expenditures Total

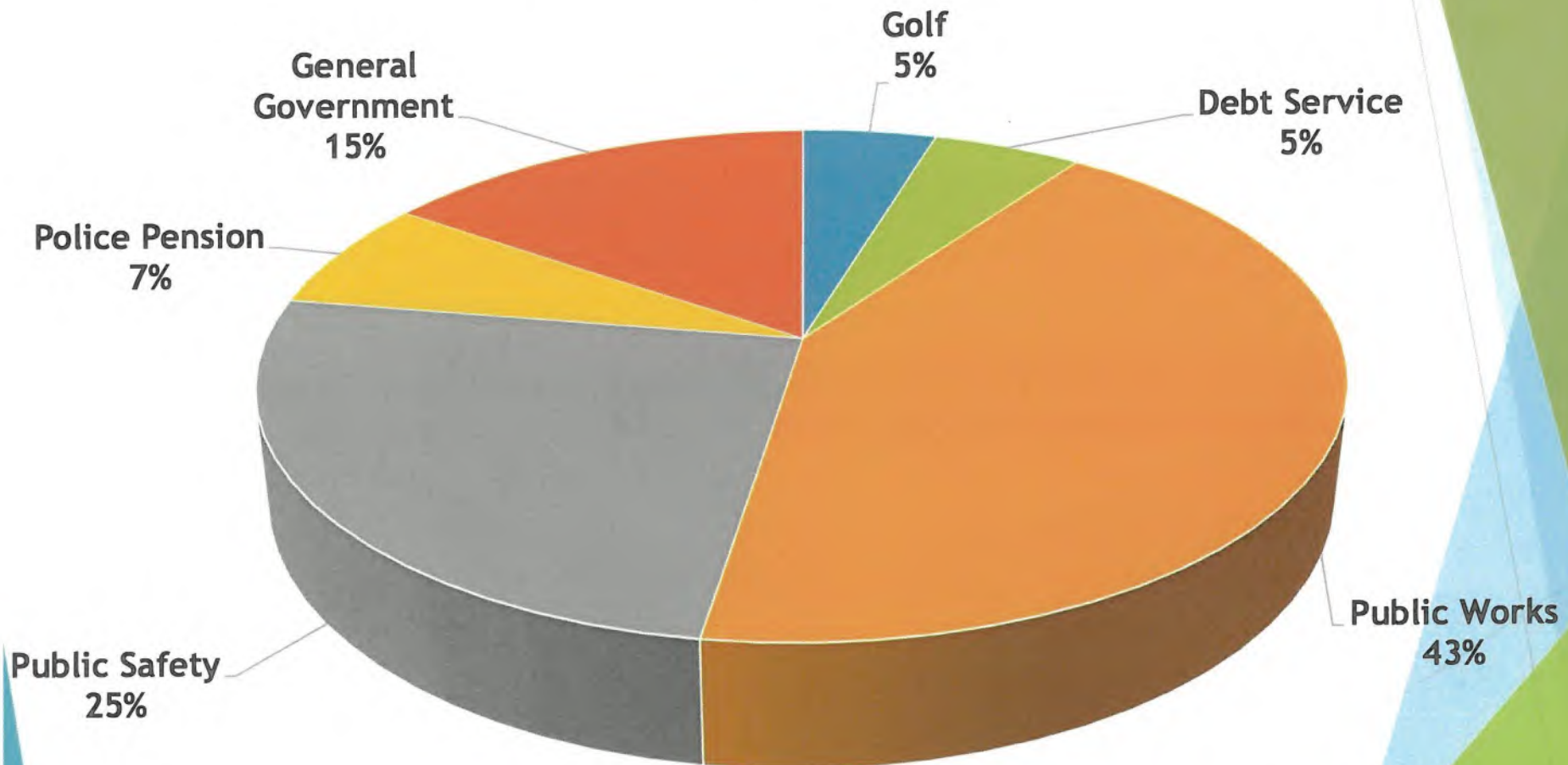
Proposed Operating Expenditures = \$57,066,227
Down from prior year for due to closing of the TIF



Operating Expenditures By Type



Operating Expenditures by Department



FY 2025 General Fund

- Estimated beginning cash balance \$22,548,186
- Budgeted revenues \$32,296,904
- Budgeted expenditures \$27,161,535
- Net transfers (\$4,657,813)
- Transfer to Municipal Building Fund (\$2,000,000)
- Ending balance \$21,025,742

1. Surplus is \$477,556 before the Municipal Building Fund TR
2. TR to Central Services \$1,272,454, increased 13% from prior year
3. TR to Vehicle Replacement \$617,374, unchanged from prior year
4. TR to Police Pension Fund \$3,001,235, equal to 2023 required contribution
5. TR to 59 & Lake TIF Fund \$360,000 of auto sales tax

FY 2025 Vehicle Replacement

- Estimated beginning balance \$2,396,379
- Annual transfer from departments \$694,242
- Proposed budget for FY24/25 \$1,781,000
- Ending balance \$1,362,511
- Estimated expenses FY23/24 \$458,733

1. A total of 13 vehicles are scheduled to be replaced in this budget
2. Two large dump trucks and one brush truck are still on order from the prior year and two large dump trucks are still on order from the current year
3. Transfer amounts will be increased with the increased cost of vehicles

FY 2025 Capital Projects Fund

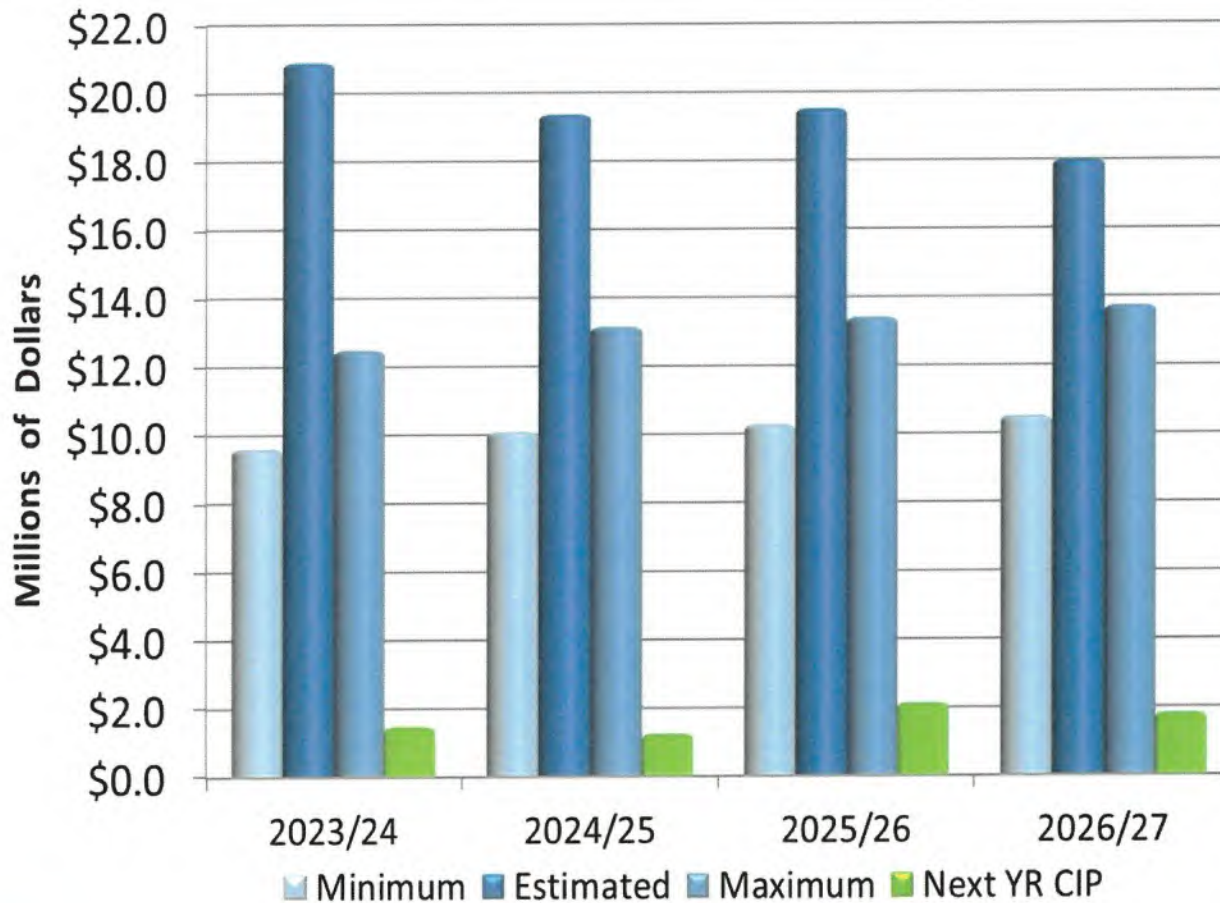
- Estimated beginning balance \$3,819,266
 - Proposed budget for FY24/25 \$3,000,000
 - Ending balance \$919,266
-
1. American Rescue Plan Act deposits totaled \$5,531,433
 2. FY24/25 projects include the water meter program, sanitary sewer rehabilitation program, and Devon Excess flow plant and force main

Budget Snapshot

- No new taxes or fees
- No change to the General property tax levy
- Police Pension contributions will continue to go up unless there is a change to the required funding laws
- Non-union wage increase of 4.0% factored in
- No additional employees
- No proposed water or sewer rate increases
- Capital improvement projects totaling \$27 million

Village of Bartlett FY 2024/25 Fund Balance Review

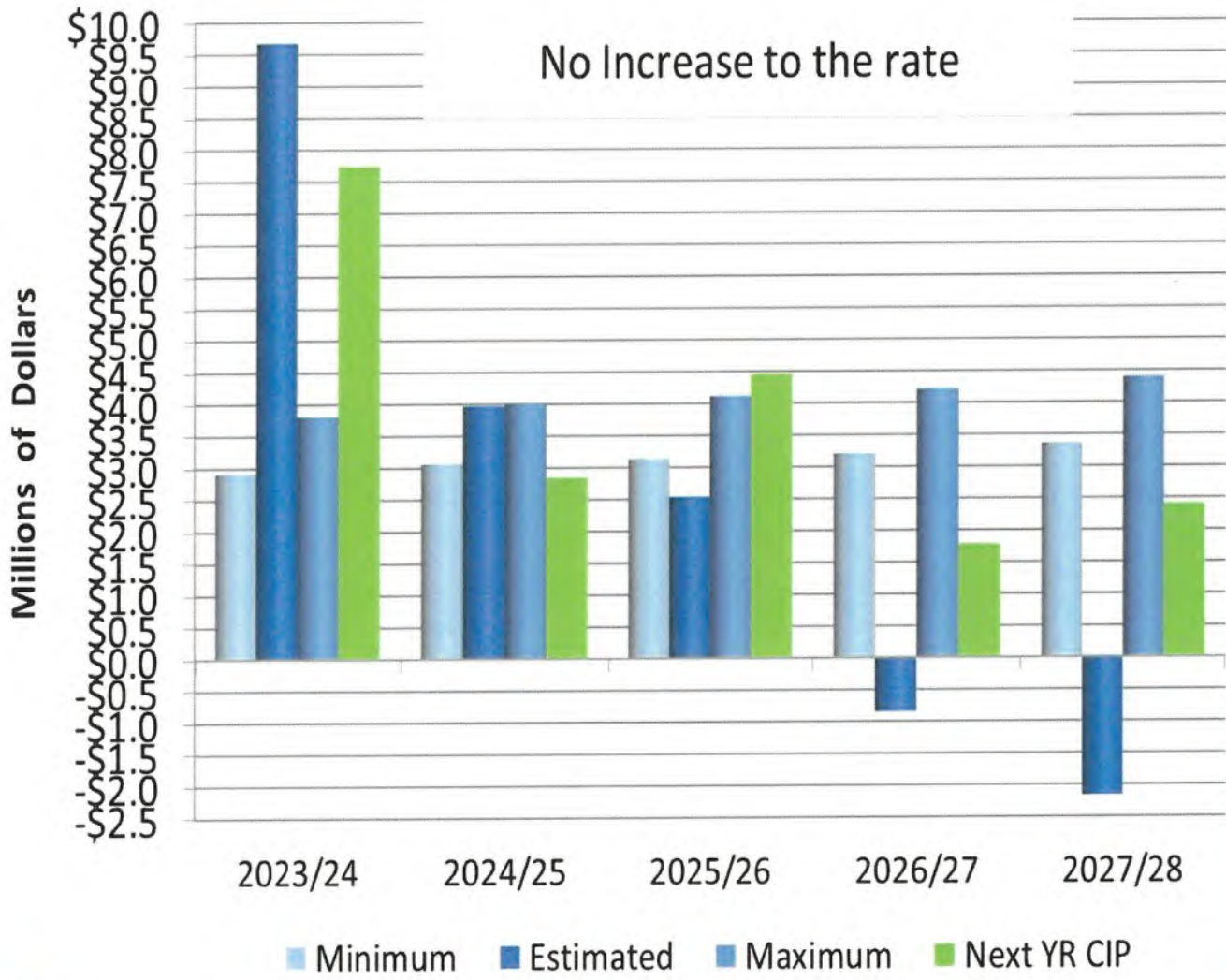
Fund Balance - General Fund



Policy

- 25 - 35% of operating expenditures
- Avg. increase in property tax levy and liabilities
- Designated reserves
- Restricted Funds

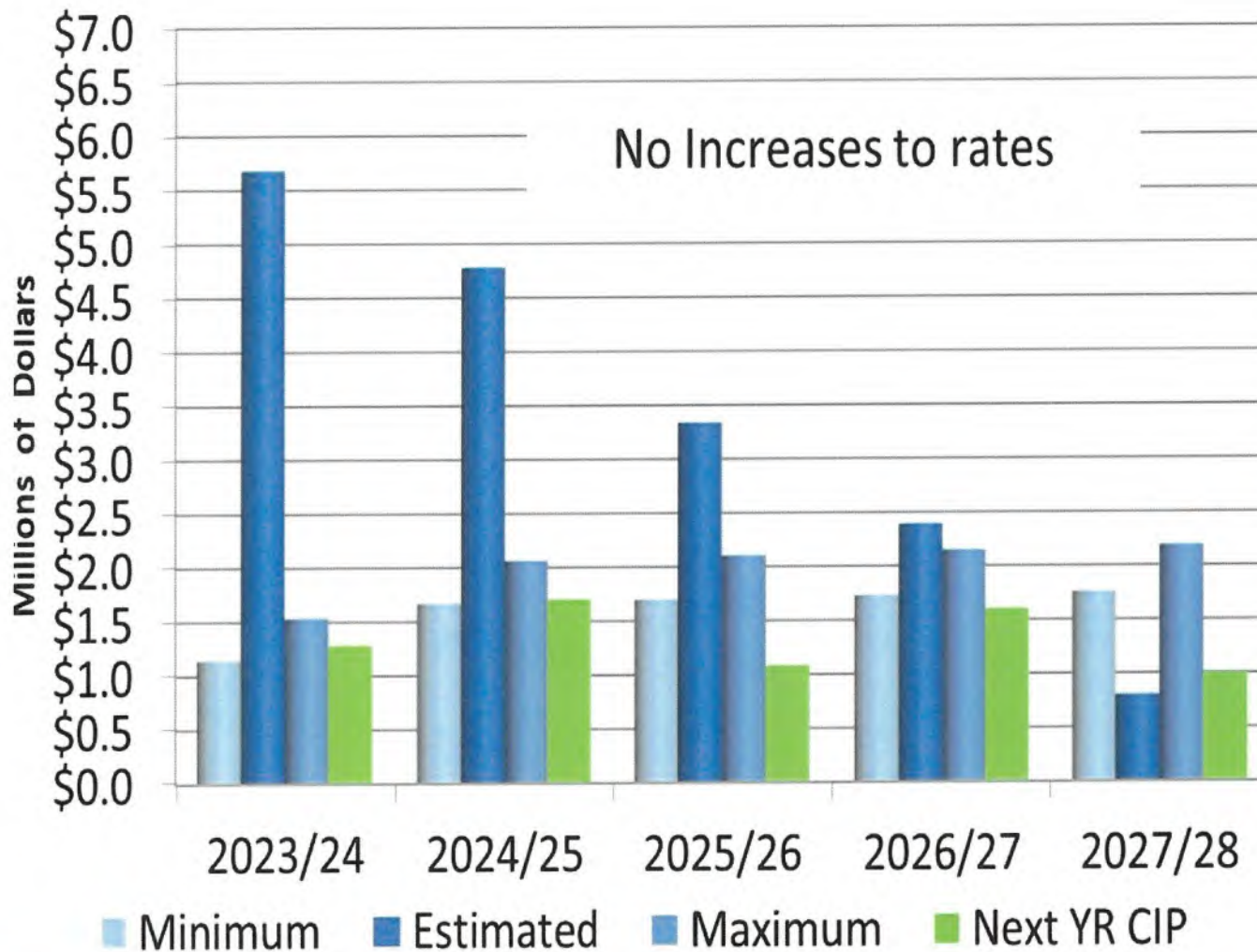
Fund Balance - Water Fund



Policy

- 25 - 35% of operating expenditures
- Designated reserves:
 - Radium Removal
 - Loan Payments
 - Capital Improvement

Fund Balance - Sewer Fund



Policy

- 25 - 35% of operating expenditures
- Designated reserves:
 - Debt Service
 - Capital Improvement Reserve

