



SHAKER HEIGHTS

Neighborhood Revitalization and Development Agenda Shaker Heights City Hall, Council Chambers Wednesday, February 12, 2020, 6:00PM

1. Introductions and Role of Neighborhood Revitalization Committee: Mayor David E. Weiss and Chairperson Tres Roeder
2. Approval of Meeting Minutes

Documents:

[NRD 10-10-19 MINUTES.PDF](#)
[NRD 11-13-19 MINUTES.PDF](#)
[NRD 12-11-19 MINUTES.PDF](#)

3. High level descriptions and overviews from Kamla Lewis, Kyle Krewson and Laura Englehart referencing their roles in implementing the Housing and Neighborhood Plan

Documents:

[EXECUTIVE SUMMARY.PDF](#)

4. Application to Acquire City Owned Vacant Lot at 3654 Daleford Road (PPN 735-30051) for Side Lot

Documents:

[CITY OWNED VACANT LOT AT 3654 DALEFORD ROAD.PDF](#)

5. Proposed Changes to City's Side Lot Program for 2020

Documents:

[CITY SIDE LOT PROGRAM FOR 2020.PDF](#)

To request an accommodation for a person with a disability, call the City's ADA Coordinator at 216-491-1440, or Ohio Relay Service at 711 for TTY users.



Neighborhood Revitalization & Development Committee Minutes
Thursday, October 10, 2019
6 P.M.
City Hall Council Chambers

Members Present: Anne E. Williams, Chair
Earl Williams, Jr., Council Member
Alex Dykema, Citizen Member
Carter Strang, Citizen Member
David Weiss, Mayor
Kamla Lewis, Director of Neighborhood Revitalization
Laura Englehart, Director of Economic Development
Bill Gruber, Director of Law
Kyle Krewson, Director of Building and Housing

Guests: Carlos Valcarcel
Adam Weinbrandt
Tim Kalan
Eileen Anderson
Lila Campoblanco

The meeting was called to order by Chairperson Anne E. Williams at 6 P.M.

* * * *

Notes

- Anne Williams indicated that at the moment we do not have a quorum.
- Anne Williams reminded everyone to speak into the microphones when making comments at the meeting as several comments from the last meeting were inaudible.

Approval of the September 11, 2019 Minutes

Anne E. Williams reviewed the minutes, and made a few changes. There were not enough members to vote on the meeting minutes at this time during the meeting. However, a quorum was reached at the end of the meeting and a motion was made, seconded and approved to approve the minutes at that time.

Two (2) Applications to Acquire City Owned Vacant Lots

Kamla Lewis indicated that there are two applications from residents to acquire city owned vacant lots that are adjacent to their properties. In the interest of time, the general aspects that govern the program will be presented as well as the specifics of each of the applications.

CITY OF SHAKER HEIGHTS

3400 Lee Road Shaker Heights, Ohio 44120 P 216.491.1400 F 216.491.1465 Ohio Relay Service 711
shakeronline.com www.shaker.life

3713 Strandhill Road (PPN 736-15-092) for Back Lot
3308 Sutton Road (PPN 735-14-005) for Side Lot

Both of the applications meet all of the criteria of the program. There are no outstanding violations. They are both current with their taxes. Neither of the applications are in foreclosure. Both are owner-occupants.

The Process. Applications are reviewed by staff. If it meets the criteria, the staff brings it to the Neighborhood Revitalization Committee. If the Committee approves it, it then goes to the Finance Committee and then to Council. Council then gives the conditional approval after which the Law Department will prepare the purchase agreement. The property is not transferred until the applicant has gone to the Planning Commission and consolidated the lot and received approval. The property is monitored until the applicant completes all of their improvements.

Application to Acquire City Owned Vacant Lot at 3308 Sutton Road (PPN 735-14-005) for Side Lot

Summary. The City has received an application from Lila Campoblanco, 3304 Sutton Road, who is interested in acquiring the city owned vacant lot adjacent to her home in order to expand her lot which has no backyard. Lila and her family were in attendance. The Neighborhood Revitalization & Development (NRD) Committee is being asked to consider this application and make a recommendation as to whether City Council should approve the sale of the vacant lot located at 3308 Sutton Road (PPN 735-14-005) to Ms. Campoblanco.

Background & Discussion

Proposal Summary

Applicant: Lila Campoblanco, 3304 Sutton Road

Proposal summary: to purchase this vacant lot, and landscape it with a fence and pergola to use it as a side yard, at a cost of approx. \$3,000. Properties in this area do not have much of a backyard so this allows them to utilize the space. She proposes to use a contractor (who is also in attendance at the meeting) to do the work. (see following drawings)

Price offered: \$100.00

Staff Review of Application

- The applicant's property is not in foreclosure, she is current in her property taxes, and has had no criminal nuisance activity complaints. She has no outstanding Housing or Zoning Code violations. She has owned this home in Shaker Heights since April 2009, and is an owner occupant.
- The applicant's proposal is consistent with the City and neighborhood goal of expanding the size of lots in the neighborhood to enable households to have larger yards without selling their home and moving elsewhere. Larger lots typically command higher prices at sale as well. Sale to Ms. Campoblanco would return the vacant lot to productive use and tax revenue generation.

- The City has no redevelopment plans for this vacant lot.
- Staff considers that the use of the lot as described would be an improvement over it being maintained by the City as a vacant lot. It currently costs the City approx. \$615 per year to maintain a vacant lot.

Background Information

- In May 2008, the City adopted a Side Lot Program to make City owned vacant lots available to the adjacent neighbors. The goal of the program was to encourage adjacent neighbors to acquire these lots to make capital improvements to the property that would increase tax value, such as construction of a house addition or garage, landscaping, etc.
- Applications are accepted on a “first quality, first served” basis. Proposals that are approved by NRD will go to City Council for final approval.
- There is no set price for side lots under the Program; pricing is negotiable based on lot size, location, configuration, planned improvements, etc.
- If the NRD recommends acceptance of this application, and it is approved by Council, the City will enter into an agreement with the applicant that will include all of the conditions and the buyer’s responsibilities. The buyer will have to seek Planning Commission (CPC) approval for the consolidation of the lots. If there are variance requirements, they may also have to seek Zoning Board approval. Only once all these conditions are met would the property be transferred.
- The property was acquired by the City in 2008 through a grant from the First Suburbs Consortium. The single family house that previously stood on this lot was demolished with grant funds by the City in 2009.
- Through its vacant lot program, the City so far has sold seventeen (17) vacant lots:

Year	# lots	Price	Buyer	Street	Use
2003	2	\$1.00 each	Rysar	Lindholm	New houses
2011	3	\$1.00 each	Zaremba	Strathavon	New houses
2011	1	\$1,000	Adjacent neighbors	Ashwood	Two side yards
2011	1	\$100	Neighbor	Enderby	Side yard
2011	1	\$1,000	Heights Christian Church	Daleford	Community garden
2012	1	\$50	Neighbor	Menlo	Side Yard
2013	1	\$50	Neighbor	Riedham	Side yard
2013	1	\$1,000	Neighbor	Daleford	Side Yard
2014	1	\$1,000	Neighbor	Avalon	Side Yard
2014	1	\$100	Neighbor	Albion	Side Yard
2017	1	\$50	3 adjacent neighbors	Palmerston	Side Yards

Year	# lots	Price	Buyer	Street	Use
2019	1	\$1	Knez	Hildana	New house

One additional vacant lot on Rolliston is being leased to a community group for use as a Community Garden, another lot on Winchell was approved for sale to a neighbor in May 2019 and another on Avalon in August 2019.

Recommendation. Staff recommends that Ms. Campoblanco’s application to acquire the City owned vacant lot located at 3308 Sutton Road (PPN 735-14-005) for \$100.00 and utilize it as a side yard, be recommended by the NRD to Council.

Vacant lot south of Campoblanco residence at 3304 Sutton Road





Proposed Improvements

Estimate

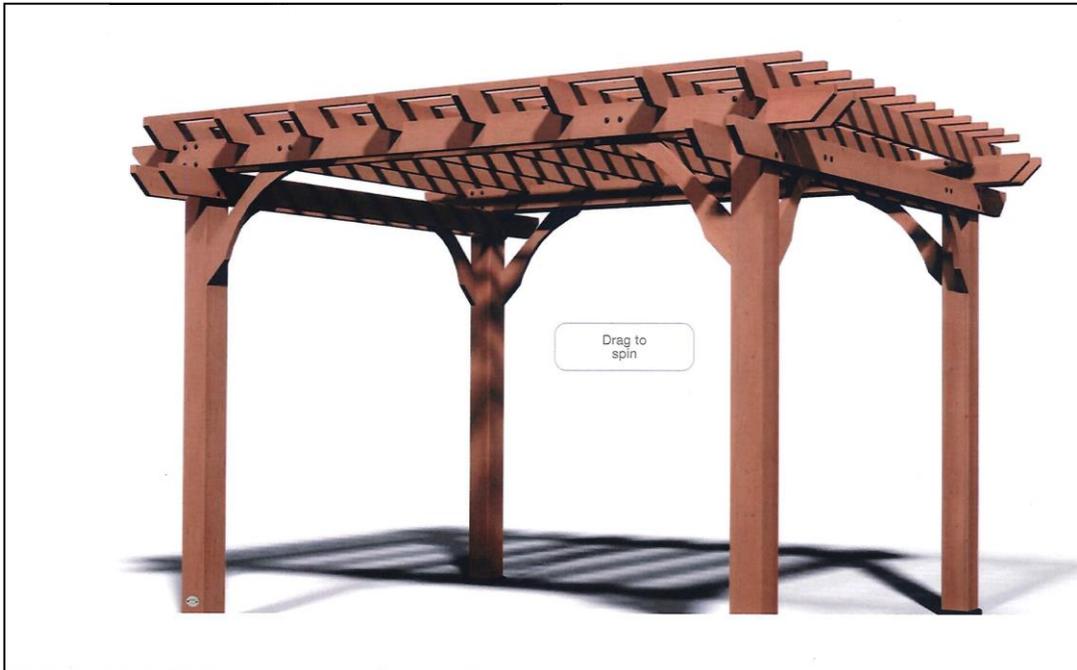
From

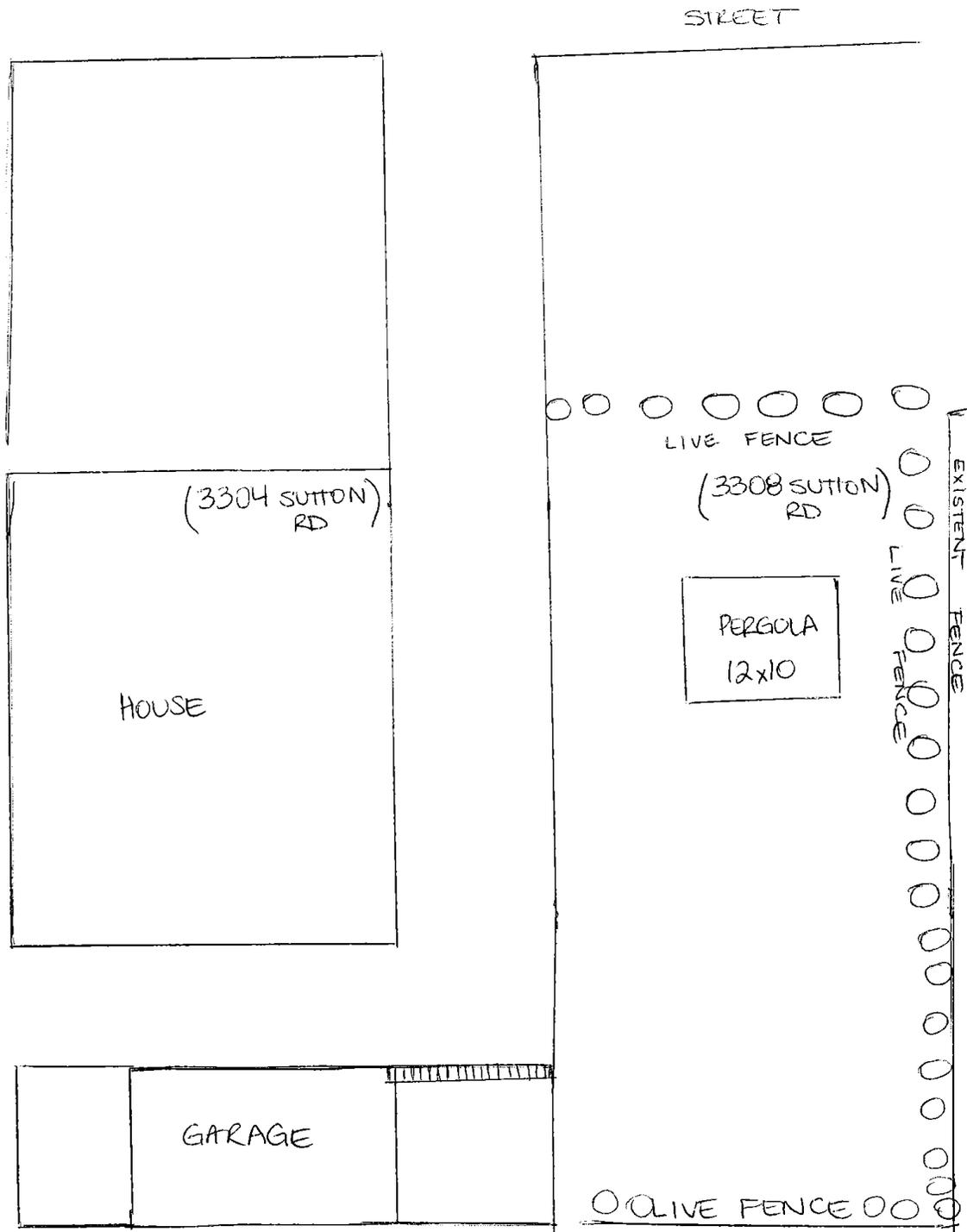
Valcarcel Landscaping
alonsovalcarcel@hotmail.com
3304 sutton rd
Shaker Heights
44120
Phone: 216-7029811

To

Lila Campoblanco
3304 sutton rd up
shaker heights
44120
Phone: 2165104665

Estimate #: EST0009
Date: Sep 28, 2019





There were no questions for the owner or contractor.

Application to Acquire City Owned Vacant Lot at 3713 Strandhill Road (PPN 736-15-092) for Back Lot

Summary. The City has received an application from Tim and Melissa Kalan, 3614 Glencairn Road, who are interested in acquiring the city owned vacant lot behind their home in order to expand their lot. Tim Kalan was also in attendance at the meeting. Many people in attendance may be familiar with Tim Kalan as he is the art teacher at two of the Shaker Heights elementary schools. The Neighborhood Revitalization & Development (NRD) Committee is being asked to consider this application and make a recommendation as to whether City Council should approve the sale of the vacant lot located at 3713 Strandhill Road (PPN 736-15-092) to the Kalan family.

Background & Discussion

Proposal Summary

Applicant: Tim and Melissa Kalan, 3714 Glencairn Road

Proposal summary: to purchase this vacant lot, and landscape it extensively to use it as an enlarged backyard, at a cost of approx. \$5,772. Tim is an avid gardener. He runs the Lomond Elementary school garden as well. His wife Melissa is very active in the Lomond Elementary PTO. They propose to use contractors to do the work. (see attached drawings)

Price offered: \$1.00

Staff Review of Application

- The applicants' property is not in foreclosure, they are current in their property taxes, and have had no criminal nuisance activity complaints. They have no outstanding Housing or Zoning Code violations. They have owned their home in Shaker Heights since January 2009, and are owner occupants.
- The applicants' proposal is consistent with the City and neighborhood goal of expanding the size of lots in the neighborhood to enable households to have larger yards without selling their home and moving elsewhere. Larger lots typically command higher prices at sale as well. Sale to the Kalan family would return the vacant lot to productive use and tax revenue generation.
- The City has no redevelopment plans for this vacant lot.
- Staff considers that the use of the lot as described would be an improvement over it being maintained by the City as a vacant lot. It currently costs the City approx. \$615 per year to maintain a vacant lot.

Background Information

- In May 2008, the City adopted a Side Lot Program to make City owned vacant lots available to the adjacent neighbors. The goal of the program was to encourage adjacent neighbors to acquire these lots to make capital improvements to the property that would increase tax value, such as construction of a house addition or garage, landscaping, etc.

- Applications are accepted on a “first quality, first served” basis. Proposals that are approved by NRD will go to City Council for final approval.
- There is no set price for side lots under the Program; pricing is negotiable based on lot size, location, configuration, planned improvements, etc.
- If the NRD recommends acceptance of this application, and it is approved by Council, the City will enter into an agreement with the applicant that will include all of the conditions and the buyer’s responsibilities. The buyer will have to seek Planning Commission (CPC) approval for the consolidation of the lots. If there are variance requirements, they may also have to seek Zoning Board approval. Only once all these conditions are met would the property be transferred.
- The property was acquired by the City in 2019 through a tax foreclosure. The single family house that had previously stood on this lot was demolished by the City in 2016.
- Through its vacant lot program, the City so far has sold seventeen (17) vacant lots:

Year	# lots	Price	Buyer	Street	Use
2003	2	\$1.00 each	Rysar	Lindholm	New houses
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One additional vacant lot on Rolliston is being leased to a community group for use as a Community Garden, another lot on Winchell was approved for sale to a neighbor in May 2019 and another on Avalon in August 2019.

Recommendation. Staff recommends that the Kalan family application to acquire the City owned vacant lot located at 3713 Strandhill Road (PPN 736-15-092) for \$1.00 and utilize it as an expanded backyard, be recommended by the NRD to Council.



Vacant lot west of Kalan residence at 3714 Glencairn Road



3713 Strandhill



3714 Glencairn

Proposed Improvements

Anchor Landscaping Est. 1998

1461 Marlowe Avenue
Lakewood, OH 44107
anchorlandscaping1461@gmail.com
(216) 470-9177



August 30, 2019

Estimate Prepared for:

Tim Kalan
3714 Glencairn Road
Shaker Heights, OH 44122

Goal:

The vacant property at 3713 Strandhill Rd., Shaker Heights, OH 44122 will be transformed from its present grass covered state to a naturalized area landscaped with native woodland plants.

Plant Schedule:

1. Carya ovata	Shagbark hickory (2)	5' #5 cont.
2. Linder benzoin	Spicebush (20)	30" #5 cont.
3. Pinus strobus	White pine (1)	5' B&B
4. Quercus alba	White oak (1)	2" B&B
5. Sassafras albidum	Sassafras (1)	3' #3 cont.

Description

The lawn area east of the house frontage line on Strandhill Road will be removed and beds will be created by adding topsoil. The spicebush will create a natural fence to the area. The remaining trees will be spaced throughout the beds. The oak, maple, and pine will anchor the northwest, southwest, and southeast corners of the property. The sassafras, ironwood, and hickory will anchor the middle of the area.

Total: 5772.00

A handwritten signature in black ink, appearing to read "Martin F. Williams".

Anne Williams indicated that she was excited to see the details of the native woodland plants.

Anne Williams questioned Kamla regarding the two previous properties approved earlier this year. Kamla indicated that they are still going through the process. The owners received their signed purchase agreement on the Winchell property after having had their surveys completed. Two more applications are pending that require additional paperwork.

Anne Williams indicated that at this time a quorum was established.

Anne Williams entertained a motion to approve the Kalan family application to acquire the City owned vacant lot located at 3713 Strandhill Road (PPN 736-15-092) for \$1.00 and utilize it as an expanded backyard. Motion was made, seconded and approved by all.

Anne Williams entertained a motion to approve Ms. Campoblanco's application to acquire the City owned vacant lot located at 3308 Sutton Road (PPN 735-14-005) for \$100.00 and utilize it as a side yard, be recommended by the NRD to Council. Motion was made, seconded and approved by all.

Proposed Tax Increment Financing on Wendy's Property

Economic Development Director Laura Englehart introduced herself to the Committee. We are actively seeking pro economic development opportunities in all parts of the city particularly building on the momentum of all of the development in the Van Aken District that has been so successful to date in which there are many more phases and opportunities.

In the Van Aken District, we aim to build on the current momentum of the first phase of new development. We propose to use tax increment financing (TIF) as a tool to promote additional development of properties on Warrensville Center Road and/or Chagrin Boulevard in the greater Van Aken District. To help encourage and facilitate such future development, we can leverage the demolition and construction of a new Wendy's restaurant at 3516 Warrensville Center Road by establishing a TIF and directing the proceeds into a fund for future development activities. This is a request to: (1) approve a TIF on the Wendy's property (the "Wendy's TIF"); and (2) authorize entering into a School Compensation Agreement with the Shaker Heights City School District.

The City has already engaged in discussions with the School District and presented this TIF proposal to the School Board. The School Board is concurrently considering approval of this Wendy's TIF at its meeting tonight (October 10, 2019).

The following provides background information on TIFs in Ohio and the type of TIF proposed here as well as an outline of the terms of the proposed Wendy's TIF.

Question is inaudible. Director Englehart indicated that this particular TIF is specific to the Wendy's property so it is a different TIF with a different arrangement with the school. The TIF's that are already in place for the other parcels within the Van Aken District are not affected by this. Any future development would come back to provide the project, the plan and the financing that is required. Full details will be provided when there is a new development that requires use of the funds that we are going to generate through this TIF.

Background Information

Payments in Lieu of Taxes (PILOTs). The goal of a TIF is to generate payments in lieu of taxes ("PILOTs") to pay for public infrastructure improvements that can attract or enable private development. A property subject to a TIF is exempt from real estate taxes owed on the future increase in assessed valuation of the property (which results from property improvements).

When a TIF is created, a "base value" of the property is established. Taxes on the base value continue to be collected and distributed as if there were no TIF. The increase in the value of the property over the base value creates the increment that is captured by the TIF. Instead of paying real estate taxes on that increment, the property owner pays PILOTs equal to the amount of taxes that would otherwise have been due on that increment.

Under Ohio law, a TIF may allow up to a 100% exemption from real property taxes for up to 30 years, subject to school approval or non-objection. A city could institute up to a 75% exemption for up to 10 years without obtaining school approval.

Background on TIF Structures. There are two basic types of TIFs under Ohio law, commonly known as .41 and .40 TIFs (named after the Ohio Revised Code sections that provide the authority). The type of TIF used determines the mechanics of instituting the TIF and the eligible uses of TIF proceeds.

1. The .41 TIF—under Ohio Revised Code Section 5709.41, TIF proceeds can be used for any urban redevelopment purpose of the City, including both public and private uses. A .41 TIF requires the City to acquire title to the property, which means a property owner must approve and be willing to temporarily transfer the property to the City. The City immediately transfers the property back to the original owner.
2. The .40 TIF—under Ohio Revised Code Section 5709.40(B), TIF proceeds can be used only for public infrastructure improvements benefiting the area surrounding the property. Funds cannot be used for private uses or go to a private developer. Use of the TIF proceeds must generally benefit the TIF property. A .40 TIF does not require the approval or authorization of the property owner, and the City is not required to be in the chain of title.

The proposed Wendy's TIF is structured as a .40 TIF, which means that the TIF proceeds received and retained by the City could be used only (1) for public improvements such as, for example, traditional infrastructure, land acquisition, environmental, or utilities; and (2) in the geographical area of the Van Aken District to generally benefit the TIF property.

Terms of the Proposed Wendy's TIF. We engaged in discussions with the Shaker Schools to prepare the following proposed TIF structure on the Wendy's property:

- 100% exemption from real estate taxes over a 30-year term;
- In each of Years 1-15, the City would receive 62% of the PILOTs and the schools would receive 38% of the PILOTs;
- In each of years 16-30, the percentages flip and the City would receive 38% of the PILOTs and the schools would receive 62% of the PILOTs.

These percentages and splits were carefully structured so that the Shaker Schools would collect more in PILOTs (based on the estimated property value of the new Wendy's) than the total annual taxes that the Schools currently receive from this property. See the enclosed chart showing the detailed estimated annual payments to each of the City and the Shaker Schools based on the estimated increased valuation of the newly constructed Wendy's property. In the event that the assumed increased valuation is not realized, the City would agree to reopen negotiations on the percentage split with the schools after the first year of the TIF.

The base value of the Wendy's property will be set as of the time the old Wendy's building was demolished. That means that taxes on the value of the land will be collected and distributed as if there were no TIF. PILOTs will be collected on the value of the newly constructed Wendy's building, as completed. The TIF will be applied to the 2020 taxes for the parcel, so the first year of PILOTs will be due and payable in 2021.

In accordance with the terms outlined in this memo, we request: (1) approval of the Wendy's TIF; and (2) authorization to enter into a School Compensation Agreement with the Shaker Heights City

School District. This request will also be presented to the Finance Committee on October 21 and to City Council on October 28.

TIF Proposal
ORC Section 5709.40
Wendy's Site

62% PILOTS to City, 38% PILOTS to Schools Years 1-15
38% PILOTS to City, 62% PILOTS to Schools Years 16-30

	Current Market Value	With New Building	Increase
Wendy's Site	Land \$ 871,100	\$ 871,100	\$ 0
	Building \$ 448,600	\$ 960,000 (80% of cost)	\$ 511,400
	Total \$1,319,700	\$1,831,100	\$ 511,400
Existing Annual Taxes on the Property (On current land and bldg.)	Non-School \$16,134* (23.2%)		
	School Portion \$53,528 (76.8%)		
	All Taxes \$69,662 (100%)		
	* City Portion of Non-School Taxes: \$4,573 (6.5% of total taxes)		

Total Annual Taxes from the Property (Land + Building)	
Current	= \$69,662
Taxes on vacant land (Base TIF Value) – after demolition of Wendy's building	= \$45,982
Estimated Total PILOTS on New Value (minus taxes on land)	= \$50,675
Total Taxes Plus PILOTS on New Value (after building built)	= \$96,657
Total Annual Taxes to the Schools (Land + Building)	
Current	= \$53,528 (Land \$35,333 + Bldg. \$18,196)
New Value, no TIF	= \$74,271 (Land \$35,333 + Bldg. \$38,938) *
New Value, TIF yrs. 1 – 15	= \$54,589 (Land \$35,333 + Bldg. \$19,256) **
New Value, TIF yrs. 16 – 30	= \$66,751 (Land \$35,333 + Bldg. \$31,418) ***

- * Schools 76.8% of land and building.
- ** Schools 76.8% of land, 38% of building.
- *** Schools 76.8% of land, 62% of building.

TIF Estimated Breakdown		62%/38% 38%/62% TIF
TIF Period		30 YEARS
Years 1-15	Schools Percentage	38.0%
	City Percentage	62.0%
Years 16-30	Schools Percentage	62.0%
	City Percentage	38.0%
Years 1-15	Annual School PILOTS	\$19,256
	Annual City PILOTS	\$31,418
Years 16-30	Annual School PILOTS	\$31,418
	Annual City PILOTS	\$19,256
TIF Proceeds Years 1-15	Schools	\$288,847
	City	\$471,276
TIF Proceeds Years 16-30	Schools	\$471,276
	City	\$288,847
TIF Proceeds over 30 Years	Schools	\$760,123
	City	\$760,123
Annual Increase in School Total Revenues from Building Value Compared to 2018 Taxes on Building	Years 1-15	\$1,061*
	Years 16-30	\$13,223**
30-Year Increase in School Total Revenues Over 2018 Taxes on Building		\$214,256

* \$19,256 (PILOTS to schools in each of the first 15 years) minus \$18,196 (taxes on Wendy's building before demolition) = an additional \$1,061 in taxes on building with a TIF compared to 2018 school district portion of taxes on building.

** \$31,418 (PILOTS to schools in each of the second 15 years) minus \$18,196 (taxes on Wendy's building before demolition) = an additional \$13,223 in taxes on building with a TIF compared to 2018 school district portion of taxes on building.

Question is inaudible. Director Englehart indicated they did a straight forward analysis where they assumed the same property value because we don't know the increased valuation over time. These numbers are very conservative, intentionally.

Question is inaudible. Director Englehart indicated that we have agreed with the schools that after that first year of the TIF period, if the valuation comes back and we are off in a negative way for the schools, that that we would come back and reassess that percentage and potentially agree to adjust this 62-38% split if needed after the valuation is determined after year 1.

Much of the comment/question is inaudible. Is our residential property value going to increase because of the commercial real estate or because our taxes are so high that it is going to continue to keep our values a little better? How can we utilize it? How can we juggle it?

Mayor Weiss indicated that these are challenging discussions. We are making proposals based on the best information we have to date trying to predict the future which is always risky. If we don't do this now, we will be kicking ourselves 20 years now. The discussions we are having with the library and the schools on the Forward Together discussions to talk about how we can more effectively and efficiently use community dollars to plan long-term for community assets which picks up everything that our taxpayers pay for – directly or indirectly. For most taxpayers, they don't know how much of their property taxes go to the schools, or how much of their income tax goes to the city, etc. Part of the reason for the Forward Together discussions are to cut through that (i.e., forget about the technical source of these revenues). We need to determine what we need as a community and then we will determine how to pay for it. Those discussions are progressing very well and will continue. We are very much at the table with the schools and the library to discuss all of these issues such as how to we keep Shaker competitive for the next 2-3 decades.

The second piece, with respect to this property and the Van Aken District, we have put some TIF's in place where nothing was there for the Van Aken District. We can look retroactively as to where we were and how did we get to where we are. What we are doing now is looking forward. Essentially, we've got the pieces/parts in place for Phase I. What we are banking on is the future of the Phases of the Van Aken District – whether that be the Qua site, residential Farnsleigh site, or office parcel where the Starbucks used to be on the corner. With respects to the office parcel, we have a broker trying to draw business interest to at least get the building built. We don't know what it is going to look like, we don't know how big it is going to be, nor we don't know what configuration it might take, etc. but we have a pretty good idea is what we have built to-date is a good start but in my opinion, what we have built today will not be enough to continue the momentum that we have. It has some great things and it's put us in a position to move forward but we all knew at the time we passed the original TIF's that it was really down the road where we were going to see the benefits. Things like additional infrastructure costs, particularly is structured parking, is probably something that we will be looking at as part of the office phase. City Council is working through next year's budget and there is no way that we will have the dollars available to keep the momentum going for the future phases of growth in the Van Aken District. This is one opportunity where it is a little different because we had a tenant who tore down their building and built another one, and the timing is not coincidental. It does provide us with an opportunity to start to leverage future spin-off development that will enable us to pre-fund these additional costs that we know that we will have over the coming years and decades. The way we structured the TIF is that these are not dollars that are going to a developer. These are dollars that will come into the city that benefit both the city and the schools because we won't have an office building on that corner unless

we are able to fund these additional costs. It will fund not only property tax but will fund additional income tax. The city put in over \$8 million dollars into the project in addition to the TIF revenues for the schools so it has been a true partnership all the way. This will essentially continue that partnership.

Comment is inaudible.

Anne Williams appreciated all of the comments. She indicated that this is something City Council has discussed the use of tax incentives in our community. Some cities in the area have stopped. This is an ongoing discussion. We need to look at this as a whole. It would be great to have this particular discussion at Forward Together. It is important to explore and keep it in mind for long term implications as it is important for the city but we can't forget the schools.

Earl Williams indicated that we need to be mindful of our experiences. State government is still driving [*inaudible*].

Anne Williams entertained a motion to approve the Tax Increment Financing (TIF) on Wendy's Property and also to authorize entering into school compensation agreement with the Shaker Schools. Motion was made, seconded and approved by all. Motion passed.

Other Business

Nancy Moore indicated that last year we heard from Colin Compton from the Planning Department that there was a program that he was researching called the Model Block Program. This program is going to attempt to look at seniors who are not eligible because of income parameters for our Senior Grant Program. There is a middle group of seniors who are struggling, not because they do not have a certain economic means, but because they are encountering certain problems with contractors and maintaining their homes. Nancy has been aware of this for many years but there has been little that Nancy can do except chase down a complaint on an individual contractor. There really hasn't been anyone within the city to intervene almost as an ombudsman or to help these seniors.

Nancy received a call from an 86 year old resident on Scottsdale. Her porch roof was re-done and needed to take off the railing. The contractor bid out the roof (\$1,000) but when it was time to reinstall the railing, the contractor told her it would be another \$2,000+ dollars as the railing wasn't in shape to be installed. Resident called Kyle Krewson who that same day went to see the railing and determined that it did not need to be replaced at all. When the permit was being closed, he had an opportunity to speak with the contractor. The contractor [*inaudible*]. This is a story that illustrates some of the problems that people have who are aging in place and who are struggling to do the right thing by their homes but actually need intervention with contractors. I just wanted to praise Mr. Krewson because, without his help, there would not be one grateful resident. I am very encouraged by the research that Colin Compton is doing. I hope that there will be a resolve that will be able to do what Mr. Krewson did individually for this one 86 year old resident. I hope that we can come up with a solution and that solution will be presented to the Neighborhood Revitalization Committee. There are more people out there that we do not understand the full dimension of their problems.

Kyle Krewson responded with a thank you but much of the remaining comments were *inaudible*.

This might be a great story to hear in a city publication because many people do not know what to do or where to go.

Anne Williams thanked Nancy Moore for sharing that story.

* * * *

There being no further business, the meeting was adjourned. The next meeting will be Wednesday, November 13, 2019.

NO SIGNATURE UNTIL APPROVED

Anne E. Williams, Chair
Neighborhood Revitalization & Development Committee

DRAFT



SHAKER HEIGHTS

**Neighborhood Revitalization & Development Committee Minutes
Wednesday , November 13 , 2019
6 P.M.
City Hall Council Chambers**

Members Present: Anne E. Williams, Chair
Kamla Lewis, Director of Neighborhood Revitalization
Laura Englehart, Director of Economic Development
Bill Gruber, Director of Law
Kyle Krewson, Director of Building and Housing
Colin Compton, Neighborhood and Housing Specialist

Guests: Valerie Maczak, ESOP
Sonya Edwards, ESOP
Mia Callahan

The meeting was called to order by Chairperson Anne E. Williams at 6 P.M.

* * * *

Notes

- Anne Williams indicated that at the moment we do not have a quorum so the minutes from October cannot be approved.
- Anne Williams also indicated that the ESOP Update will be discussed first, followed by the SHDC Loan Extension.
- Anne Williams also indicated that everyone should introduce themselves and speak clearly into the microphones.

ESOP Update on the Pilot Program for Tax Delinquent Seniors

Anne Williams invited guests in attendance to join the committee at the table.

Sonya Edwards, Director of Financial Counseling with ESOP
Valerie Maczak, Grants Manager with ESOP and the Benjamin Rose Institute on Aging

Kamla Lewis indicated that the city entered into contract with ESOP in February 2019 with the goal of having a pilot program that was aimed at gaining a better understanding of the best ways to address the issue of our tax delinquent seniors. Seniors represent 1/3 of our delinquent tax roll. We really needed to understand this and determine the best ways we could assist them.

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We have made a significant impact on the problem of delinquent taxes. Since we started putting resources to tackling this issue in Spring of 2018, we have seen the following results:

- The number of delinquent parcels has declined by 35%.
- The amount of delinquent taxes has declined by 24%.
- The number of owners on payment plans has tripled.

Specifically, when we look at seniors:

- The number of tax delinquent seniors has declined by 24%.
- The number on payment plans has increased by 133%.

During the nine months of working with ESOP, we met with all the city departments that interact with seniors to educate them about ESOP services. We met monthly with the ESOP staff to review the progress on each of the cases. We had ESOP staff in during office hours in the community building. We have marketed ESOP services through the Shaker Life Magazine, the Mayor's E-News, flyers throughout the community and a number of workshops from ESOP. We have also done direct outreach to all of the condominium buildings, neighborhood associations and the churches in the community.

Kamla provided a handout that contained the details on the delinquency tax results. On the bottom, you will note, since ESOP began offering its services in March 2019, we've seen the number on Homestead go down by 19% and the certified tax delinquency of those on Homestead down by 9%. There has been a 30% increase in those on Homestead who were on payment plans.

Sonya Edwards will provide information on the type of clients ESOP has been seeing and what we have learned through the interaction so far.

Kamla Lewis introduced Sonya Edwards.

The three kinds of clients are:

1. Those that have attended ESOP workshops at apartment buildings (Campbell Court, Library Court). Older adults who seem to be the most stable. They attending the workshops by engaging and learning. They are joining their matched savings program. The program engages in coaching with ESOP for 6 sessions in dealing with reducing expenses, reducing debt, increasing savings, working on credit, etc. ESOP matches dollar-for-dollar up to \$500. One of the clients at Campbell Court (75 year old, single male) had \$196 left over every month, we got him to agree to participate in our matched savings program. His surplus each month is now \$471 and he has \$1,000 for emergency. This is the typical client we are seeing that is coming from stable, affordable housing.
2. Another group of clients are those that delinquent property taxes or housing violations. They may just need a little bit of help getting on the property tax plan, or need help connecting to Colin to get those repairs done. They need ESOP to look at their budget. Some clients have had some pretty high debt and needs

restructuring. They need to get the repairs done, get the violations eliminated, and get on the property tax plan. They look sustainable. A 90 year old female, living in a condo on Warrensville Center Road, was able to get on a payment plan for her \$7,000 in delinquent taxes. She also had delinquent HOA dues. She looks good going forward.

3. We have found this group that we have found that really needs to transition. They are coming to us with multiple issues. Either than can no longer maintain the taxes, the violations, rental properties/two family properties, etc. A 75 year old couple living on Hildana is an example. The husband is a retired real estate agent with dementia. His wife is displaying some early stages of cognitive issues. They live in a two family property (downstairs). They have not been able to rent the upstairs for many years. They hired a management company and paid a lot of money. They also have a condo in Beachwood that they are renting to a young lady that they feel sorry for that is paying less than what they are bringing in. They have delinquent taxes on that Beachwood property, as well as delinquent HOA dues. They also have a family member who passed away and now they have that family member's property that is in Cleveland that had a due on death lien that is now due. A family member is living in that home. This couple doesn't know what to do or where to turn. They are afraid to sell any of the properties but this is what they need to do. The husband still thinks in moments he can manage, but he can't. It's been difficult to get them to commit to going ahead and getting any of the properties on the market. We did have a conversation with the tenant in the condo in Beachwood to see if she is in fact able to purchase that property (as that would make them feel better). If she's not able to buy and we can't help her through our home buyer education and pre-purchase, they have agreed that they will put it on the market. So we are going to work with her first because that's important them.

What this has taught us and what we have found is missing anywhere that we can find is really a workshop suite of modules that teaches someone how to plan for transition, how to identify what are your options, and understand what is a reverse mortgage. We can even bring in the social worker from Benjamin Rose to talk about how do I emotionally detach from the house and my personal belongings. We're looking at 6-8 modules to cover all of the subjects that need to be covered, trying to figure out a name, etc. This is need all over, not just in Shaker Heights.

Many people do not know that there is an option to be on a payment plan. Working with the County had been slow but it is now a 36-hour turnaround. ESOP has an existing relationship with the County and they have assigned a specific person to work with them. Many of the referrals for this program come from the 211 United Way hotline, workshops and other referrals come from Colin Compton.

The pool of people that we worked with 1:1 closely was about 44 people; 19 of which were over 81 years old. We need to start having services available to people at a younger age.

The racial and gender breakdown was similar to other clients; female and Africa-American. What wasn't typical was the economic range: \$698 per month to \$12,096 per month. Many of those are the most difficult to transition.

There is another case where they were also realtors and have multiple properties. But can no longer manage them and making poor decisions regarding collecting/charging rents.

We currently have five people enrolled in the match savings program; three graduated already and two are still enrolled. The average decrease in debt was \$3,258 and average increase in the credit score was 36 points. The benefits assessments average savings has \$966 and right now it is enrollment time again for Medicare.

What is a benefit assessment? The information from the applicants is entered into the National Council on Aging's Benefit Check-Up which is checking over 1,300 federal, state and local benefits/entitlements (300 page booklet). The applications are completed and signatures are collected as well as documents. Benefits such as Medicare Part D often change and increase through the years and many of the applicants are not aware of these changes. And some medications are not covered as well. The service is to ensure the doctor and pharmacy that you like to use is covered.

People who are just a little behind (#2) is a struggle. It seems ludicrous have someone lose their home over a small amount. It will cost us more as a community than as a society. We would like to look at some options there as well. Sonya has done research and has found an interesting model that has been practice in Massachusetts since 2000 that may give an option for this. We started an exploratory conversation with our account treasurer to see if something like this can be implemented in Cuyahoga County. The County is interested.

Based on the impact that we've seen so far, we will enter a contract with ESOP for 2020. Anne Williams thanked the representatives from ESOP for the program and presentation.

Anne Williams asked Colin Compton to speak to the details of the program. Colin Compton's comments were inaudible and irregular.

Extension of time for repayment of loan to the Shaker Heights Development Corporation

Laura Englehart indicated that in December 2013, City Council authorized a loan for \$27,200 from the Economic Development and Housing Reserve Fund to the Shaker Heights Development Corporation (SHDC). The loan supported professional services to help SHDC raise funds for the Shaker LaunchHouse Institute (SLHI), the first program of the SHDC, focused on educational initiatives to inspire entrepreneurial creativity and critical thinking skills in middle, high school, and college students, as well as other entrepreneurs. The loan was originally to be repaid to the city by the end of 2016. At that time, after the SLHI became defunct and SHDC began to pursue other strategic objectives, City Council extended repayment of the loan. The loan is now set to mature

in January 2020. This is a request for a recommendation to extend the loan on its same terms for an additional three years to January 2023.

As background, the former nonprofit Fund for the Future (FFF) ceased operations in 2012 and transferred its reserves and outstanding receivables to SHDC, in part to support commercial and neighborhood development in the Moreland and Lomond neighborhoods. Eligible uses of these funds did not include fundraising for the Shaker LaunchHouse Institute, so the city loaned \$27,200 to SHDC to fund a contract with a fund development consultant to help raise funds for SHLI operations. The consultant, the Hodge Group, evaluated fundraising strategies for SHDC, engaged numerous potential funders and pursued a number of grant opportunities, all focused on SHLI.

To allow SHDC to transition its programming away from an initial focus on SLHI, take over program operations of the City-owned building at 3558 Lee Road now known as The Dealership, and update its economic development strategies, in 2016 City Council approved a three-year extension for the repayment of the \$27,200 loan, until January 2020.

During this past three-year period, SHDC, among other activities:

- (1) Rebranded and improved The Dealership co-working facility, which is now consistently at 85-90% occupancy and is stabilized after a tumultuous 2016 and 2017;
- (2) Facilitated real estate acquisitions and improvements along Lee Road, including helping Protem Healthcare Services and Process Canine open and expand in previously vacant properties, which brought more than 50 new employees to the Lee Road corridor;
- (3) Implemented targeted streetscape enhancements at the intersection of Lee and Hampstead roads; and
- (4) Began to convene the Van Aken and Chagrin-Lee business associations.

Given these early successes and the need to continue the momentum of these new updated economic development strategies, SHDC has requested a three-year extension for the repayment of the \$27,200 loan, until January 2023.

Going forward, SHDC will continue to expand its current efforts, focusing its resources on furthering real estate development activities along Lee Road and identifying new revenue streams for SHDC to help make the organization less reliant on major fundraising events and City financial support.

The City fully supports SHDC's efforts, which complement and strengthen our own economic development efforts throughout the city. Therefore, the Economic Development Department requests that the Neighborhood Revitalization and Development Committee recommend to Council the extension of time for SHDC to repay a \$27,200 loan, from January 2020 to January 2023. The interest rate will remain at 1% per year, and repaid loan proceeds will return to the Economic Development and Housing Reserve Fund.

Anne Williams indicated that this has been a long time for a relative small amount, and wondered if there is a reason why it hasn't been paid. Laura Englehart indicated they are working on additional fundraising opportunities and new strategic planning developments. They have a lot of momentum going now and don't want anything to hinder that at this time.

Anne Williams said it would be helpful for Council to have an overview of what is going on with SHDC and they should provide us with an update. Laura agreed.

We need to move this forward now as it expires in January 2020.

This could not be voted on because there was not a quorum but Anne Williams supported it.

* * * *

There being no further business, the meeting was adjourned. The next meeting will be Wednesday, December 11, 2019.

NO SIGNATURE UNTIL APPROVED

Anne E. Williams, Chair
Neighborhood Revitalization & Development Committee



SHAKER HEIGHTS

**Neighborhood Revitalization & Development Committee Minutes
Wednesday , December 11 , 2019
6 P.M.
City Hall Council Chambers**

Members Present: Anne E. Williams, Chair
Nancy R. Moore, Council Member
Earl Williams, Jr., Council Member
David Weiss, Mayor
Kamla Lewis, Director of Neighborhood Revitalization
Laura Englehart, Director of Economic Development
Kyle Krewson, Director of Building and Housing
Colin Compton, Neighborhood and Housing Specialist
Katharyne Starinsky, Sr. Economic Development Specialist

Guests: Lee Kay
Jewel Kirkland
Eileen Anderson
Kevin Kay
Diana Whitmore
Carmella Williams

The meeting was called to order by Chairperson Anne E. Williams at 6 P.M.

* * * * *

Meeting Minutes

Anne Williams indicated that we do not have a quorum, therefore, the minutes from both the October 2019 and November 2019 meetings cannot be approved.

Accept Round 3 SBA-Muni-County Small Business Finance Initiative Funding (\$150K) and Appropriate \$50K from the Housing and Economic Development Reserve Fund to Replenish the SBA Shaker Partnership Loan Fund

Katharyne Starinsky indicated that they are ready to accept round three funding from the SBA Small Business Finance Initiative Funding in the amount of \$150K and to appropriate \$50K from the Housing and Economic Reserve Fund to replenish our SBA Partnership Loan. The City of Shaker Heights was one of two cities (along with the City of Cleveland) to successfully pilot the first round of the SBA-Muni-County Small Business Finance Initiative (the Muni-SBI Program) in 2014. In Shaker, we call the loan

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the SBA Shaker Partnership Loan. To launch the pilot program, the City and Cuyahoga County each committed \$250,000 and the City committed \$250,000. Of that initial \$500,000 fund, \$143,654 remains. With the knowledge that there are three possible projects in the pipeline for the first quarter 2020, to be able to continue support small business growth throughout the remainder of the year, we applied to receive Round 3 funds (\$150,000) from the County. These funds are a critical part of growing the business ecosystem in the City. Because we have \$143,654 remaining, we decided to apply for the Round 3 funds and we were lucky to be awarded those funds. It will be official on December 16, 2019, when the Cuyahoga County Board of Control officially votes.

Once we receive the Round 3 funding (\$200,000), it will bring our available loan funds to \$343,654 to loan to businesses in the coming years.

The Economic Development Department requests that the Neighborhood Revitalization and Development Committee recommend to Council:

1. That the City enter into an agreement with the County and SBA to accept Round 3 SBA-Muni-County Small Business Finance Initiative funds in the amount of \$150,000.
2. Appropriate \$50,000 from the Economic Development and Housing Reserve Fund to participate in the Round 3 initiative.

PILOT PROGRAM SUCCESS

Since the program’s inception in 2014, the City has completed twelve Muni-SBI loans resulting in \$356,346 in forgivable loans, which has leveraged \$2,425,009 in total financing for the projects.

Business	Projected Job Creation	Lender	Total Forgivable Loan Amount
Juma Gallery LLC	1 FT, 5 PT	Citizens	\$ 40,000
J. Pistone's Market & Gathering Place	2 FT	Huntington	\$ 19,012
Protem Healthcare	50 FT, 100 PT	Ridgestone	\$ 78,465
Marc Anthony Spa	18 FT, 14 PT	Faith Community Credit Union	\$ 37,500
Sparks Beauty Supply	1 FT, 3 PT	ECDI	\$ 10,347
Core Life Chiropractic	1 FT, 2 PT	Huntington	\$

			23,938
Luster, A Gift Boutique	2 FT, 2 PT	Huntington	\$ 19,915
Spice for Life	1 FT, 2 PT	Key Bank	\$ 11,250
Banter	4 FT, 3 PT	Huntington	\$ 14,612
Nature's Oasis	10 FT, 12 PT	Huntington	\$ 71,250
Master Marr's Taekwondo	2 FT, 2 PT	Huntington	\$ 22,057
Around the Table Yarns	2 FT	Key Bank	\$ 8,000
TOTAL	94 FT, 145 PT		\$ 356,346

These projects have furthered the revitalization of Shaker's commercial districts and have resulted in job creation, increased income tax revenue, and the expansion of Shaker's target industry areas. Significantly, nine of the twelve forgivable loans were made to help start businesses in the greater Van Aken District; six were made to businesses owned by Shaker residents; eight were awarded to new-to-Shaker and/or start-up businesses; four were made to existing businesses for expansions.

PURPOSE

The purpose of the SBA Shaker Partnership Loan is:

- To foster and accelerate small business entrepreneurship through startups and expansions within the City of Shaker Heights, thus promoting the growth of these businesses, creating new jobs and increasing income tax generation to benefit the community as a whole.
- To close the financing gap created when small businesses lack sufficient equity to qualify for conventional bank financing, by providing these entrepreneurs with a credit enhancement performance grant/forgivable loan.
- To support businesses in securing a SBA-guaranteed bank loan that is coupled with quality technical assistance from a Small Business Development Center (SBDC) to strengthen business health.

PROGRAM OVERVIEW

When a qualifying small business prospect is interested in starting or expanding in Shaker Heights, City staff determines if the business could consider the SBA Shaker Partnership Loan to finance their project. The program requires the following:

- The business must contribute 10% equity;
- The SBA Shaker Partnership Loan program funds additional supplemental equity in the form of a performance grant/forgivable loan for 15% of the project cost up to a maximum amount of \$50,000 or up to \$100,000 for targeted designated sectors, including design, engineering and high-tech (the Performance Grant);
- An SBA-guaranteed bank loan provides the remaining 75% of project costs.

The Shaker Heights Performance Grant is subordinated, put on standby, and forgiven over a three to five-year period. The borrower is required to obtain technical assistance through a Small Business Development Center (SBDC) of their choosing. The City also requires the business to provide income tax projections that meet or exceed the City's contribution to the Performance Grant over the contract term, which is typically in-line with their lease timeframe, usually three to five years.

STRUCTURE & TARGET MARKET

The Pilot program has been so successful that much of its structure will remain for the Round 3 program, including eligibility, the application process, program administration, and maintaining a high maximum Performance Grant for target industries. As with the Pilot program, target markets will include, but not be limited to, the following:

- Healthcare, IT, Professional Services, Engineering, Design (light industrial/assembly possible)
- Home based businesses and high tech entrepreneurial stage II companies moving into maker/office space
- Amenities like retail and restaurants in core commercial districts

Overall, the project will stay very much the same as in the pilot years. We will, however, be shifting more emphasis on Chagrin+Lee by encouraging businesses to utilize the loan in that area in particular both existing (who may be expanding) but also those who are new to the area. Also there will be an emphasis on office use, particularly on Chagrin+Lee. Strengthening the Chagrin+Lee commercial district is a top economic development priority for the City. Working in partnership with Shaker Heights Development Corporation (SHDC), we are taking a proactive approach to business growth in the Chagrin+Lee commercial district by assisting businesses that are ready to grow out of The Dealership and strategically helping to rehabilitate underutilized properties for business expansions. Round 3 funding will provide a needed tool to help advance these efforts.

Furthermore, businesses that hold County certifications such as Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Small Business Enterprise (SBE), and/or are recognized by the SBA as Veteran-owned businesses will be given priority consideration. Also, in line with City Council's recently enacted additional provisions to its anti-discrimination laws, priority consideration will also be given to the LGBTQ community.

PROGRAM IMPACT

The SBA Shaker Partnership Loan has already and will continue to foster and accelerate small business entrepreneurship through startups and expansions within the City of Shaker Heights. As a result, new jobs will be created, existing jobs retained, and increased income tax generation will benefit the community as a whole.

The value of the SBA Shaker Partnership Loan to a business is significant because the Performance Grant (1) reduces the amount of equity needed up front for a business to secure a SBA-guaranteed loan, providing greater access to capital; and (2) requires technical assistance from a SBDC, resulting in a more robust, healthy business and business community.

CONCLUSION

The SBA Shaker Partnership Loan is an important part of the business ecosystem in the City. It has provided access to capital for new and existing small businesses that may not have located in Shaker or opened at all if not for the SBA Shaker Partnership Loan program. To continue this program, the Economic Development Department requests that the Neighborhood Revitalization and Development Committee recommend to Council:

1. That the City enter into an agreement with the County and SBA to accept Round 3 SBA-Muni-County Small Business Finance Initiative funds in the amount of \$150,000.
2. Appropriate \$50K from the Economic Development and Housing Reserve Fund to participate in the Round 3 initiative.

We have already presented to the Finance and Administration Committee and they approved the recommendation to Council.

Questions/comments from the audience were inaudible. Katharyne indicated that the area is not zoned for light industrial but assembly. At present, there is not a plan to change the zoning but we are embarking upon a Lee Road planning process next year and that may be something that might be changed as a result of the process. This program, however, can flex with whatever we it is we decide to do from a city perspective. We layout the parameters of the program and what fits our community best.

Nancy Moore indicated that this is one of the topics that the "Forward Together" group has discussed - the possible discussion about the Bus Garage and its location.

Questions/comments from the audience were inaudible. Katharyne indicated that is a commercial/mixed-use property so it is allowed but we don't have any currently.

Questions/comments from the audience were inaudible. What is the current and/or proposed zoning that occurs along the Chagrin+Lee corridor? Was that going to change? Will our current zoning allow for higher income employees who would give us high tax revenue?

Nancy Moore indicated the business contributes a 10% equity, the actual partnership loan constitutes 15% of the project costs, and then the additional 75% comes from the SBA. It actually makes it possible for new businesses or businesses that want to expand but may not have the ability to get a total commercial loan for the full amount they need to actually move and establish themselves. For that reason, what's been done in the Van Aken District is +\$2million in financing. That is absolutely incredible. To think that we could apply the same standard and the same stimulus to Lee Road would be incredible as well. Thinking back, we were trying to get businesses to move into that area and mantra that everyone was saying was that "this is south of Chagrin". Now the fact that we are moving so many businesses to revitalize (not just Van Aken District) but we are moving it into this area is a step forward. She thanked Katharyne for her efforts.

Katharyne also indicated that the largest forgivable loan to date was actually a Lee Road business, ProTem Healthcare (which is 50 full-time employees now).

Without a quorum, we cannot do a recommendation.

Update on Neighborhood Engagement Work with Kay Coaching

Colin Compton provided an update on neighborhood engagement work that has happened over the past three years in Shaker Heights. There will be an overview of what neighborhood engagement is, why we do it, introduce our consultant team, go over some of the resident narratives of how this work has affected their experience as residents, and some indicators of progress that we've seen, and to touch on what is next, moving forward.

Neighborhood engagement is a really common term you'll see today. Many institutions have someone who does this work. In most cases, that institution packages their programming and what they do and they take it out into the neighborhood. It is essentially a top down approach. In Shaker, it is very different. We start first with building relationships with and among residents, learning residents interests, skills and concerns, and connecting residents to support for their ideas. This leads to more genuine and deeper relationships with residents because it doesn't start with a project or a need, it starts with their power and interests as residents.

Neighborhood engagement leads to safer, more active streets. There are 3 major determinants of our local safety: 1) how many neighbors we know by name; 2) how often we are present in the community outside of our home, and 3) police response.

Connected neighbors also lead to self-supporting networks and stable neighborhoods where residents are proud of where they live, stay longer, renters become owners, etc. Acid based approaches lead to pride of place and quality of life where residents are building on what's good and collective action on what can be rather than what is the problem. Supported residents lead to bottom up ownership where residents become the agents of change in their neighborhood and connections to institutions and mutually beneficial ways. In other words, we are doing this with residents rather than to residents.

Lee and Kevin Kay from Kay Coaching our present. A husband/wife team that have several decades of experience in community building. They both have experience as Shaker residents as well. Their job is about connecting people to each other and to opportunities in way that feels safe, fun and productive. They have been working with Economic Development since 2017 when Colin Compton's position started at the city. They have a deep knowledge in network building and have also worked in similar nearby communities with Buckeye Neighborhood and with Neighborhood Connections as well.

They increase resident participation, they connect residents to one another and to projects they may be interested in, they build resident leadership capacity, they organize and lead group leadership training sessions, and they attend and support resident-led events. Along with their professional experience and their connections in the area, their value also comes from their experience as former residents of a resident-focused bottoms up approach. They are available for residents who are doing this work after they come home from work and on weekends.

Input from residents about the effect the work has had on residents and on the City indicated. Colin indicated that residents know more of their neighbors. Colin shared some direct quotes from residents. This element of residents getting to know one another really is where it all starts and we must continually spend time in connecting residents and bringing in new people. As residents are involved and become more involved and build capacity as leaders, they take on more elaborate and deep projects. We must continually bring in new energy and new leaders to build that place. Some indicators of progress:

1. More residents are active in the network. Since January 2017, we have seen a 216% increase in our Moreland contacts. We started with 79 and today we have approximately 171 representing resident that have participated in events, come to gatherings, etc. That's how we have received their information. Those new connections, as a result, have sparked resident initiated projects - neighborhood clean-ups, movie nights, game nights, holiday celebrations, theatrical productions, on going series called "Working Toward Racial Harmony", etc. Most of these projects were possible because residents that didn't know one another before had an environment where they could meet and discuss ideas. These gatherings, while they look like fun and social events, they really are an

opportunity for these residents to energize one another and discuss their shared vision for the neighborhood.

2. Residents have more support. They now know that it doesn't take forever to move from an idea to action. Community is not about griping but it's about transformation. They have a better understanding of how to connect with people to bring the ideas to fruition. They are empowered without strife and they are part of the solution. Rather than a traditional neighborhood association structure, residents who take part in this network building have a positive and a strife-free environment for giving and receiving support. Support comes from neighbors and from the city. There are no titles; there are no roles. What that does is prevents a small group of residents from taking on all the work, getting burnt out and saying "No, thank you. I'm done." As an example of that, this past weekend, Moreland residents came together to plan their holiday celebration and there were 15 of them discussing how they can help to plan the celebration. When we started this, we probably would have had only 2-3 planners and 15 attend. Now we're having 15 plan and who knows how many attend. We've tried all manner of network building strategies. Since January 2017, we've hosted 56 leadership building workshops - group exercises where they may be discussing project, learning a skill, working through an exercise. There have also been 1:1 meetings, monthly meals, neighborhood walks, and attendance at school events. Another indicator is that more of Moreland residents are active leaders. Early on we had about 13 really strong, active leaders. Those leaders have remained there, have remained active. Now we have about 14 newly active leaders. No residents in this time period have dropped off, and according to Kay Coaching, that is very unusual. Lastly, this leadership continues to evolve and grow. As new residents come in and are becoming active, we are building that capacity and connections, and we are simultaneously, supporting those residents who have been active for a long time to tackle those projects of interest. Those residents do not have to spend time doing logistics and capacity building but they can really spend time on what they need and want to do.
3. Residents are more connected to the City. Colin shared some direct quotes from residents. Through participation such as Forward Together where most, if not all of the Moreland residents that participated, learned about it through the Moreland network. We've had a number of lengthy Shaker Life features of Moreland residents. Those stories, those gifts, those talents were discovered through this work. Residents have participated in neighborhood improvement input meetings so the SHDC streetscape at Lee and Hampstead, improvements at Chelton and Hildana Parks, Human Relations Task Force, direct personal relations to staff and representatives. This increased participation has benefitted not just the City but also the Schools and the Library who are exploring acid based

community development approaches to their work and those institutions have been able to give support to residents for their projects of interest.

4. Residents feel differently about their neighborhood. Elements of this are that 1) some people feel they have a new and positive opinion of my community through people they didn't know before, 2) people feel comfortable walking in neighborhood.

In summary, initially a small group of residents were focused primarily on continuing neighbor night (a once a month event). Now, there is a more robust group of leaders, there are different levels of deeper involvement in Moreland and beyond. What's left to do is to continually bring in new residents and build capacity for leadership, support those longer, active residents in their projects and ideas, better reach families with school-age children, etc.

As we continue into 2020, some potential focus areas that the network may focus on in addition to the "What's Left to Do" area could be: continuation of the Moreland model block program, connections to their merchant neighbors in the Chagrin+Lee area (both the merchants and the residents have expressed interest), oral interviews and theatrical interpretations for Black History Month, census, proactive ways that residents can address home repairs in advance of Moreland home inspections next year.

Nancy Moore indicated that Moreland and Boulevard are up for exterior systematic inspections next year so the Moreland model block program is very timely.

Nancy Moore also indicated that the only problem that Council sees with this entire program as a result of Kay Coaching and growing the leadership in Moreland is that it should be spread to all neighborhood in Shaker Heights. There are quite a few neighborhoods that would give a lot to have it spread to them. Whether that happens sooner or later, it is a testimony to the success.

Anne Williams said it has been really exciting to see this happening over the last few years. She thanked Colin Compton for his efforts as well as Kay Coaching.

Earl Williams indicated that several months ago, there was a grant for about \$50,000 that went to the Moreland community. Did that grant contribute to the effort? Do we also need to renew our efforts to continue that money or should we make other arrangements to make sure that this does not in some way fail because it was not financially supported?

Colin indicated that it could have been one of two grant programs. One was the Carol Peterson which was an outside funded program for interior and exterior home repairs. That was spread throughout Shaker Heights (not neighborhood specific). The second was the Moreland Model Block program. The idea and structure behind that really sprung from that work where it is combining exterior improvements on resident's homes with resident's pairing and teaming and doing it in a concentrated area.

Earl Williams asked if there is a need to seek a larger amount of money from the source of the grant from the Moreland Model Block program or we need to consider City-wide whether to use that pot of money for the same things.

Anne Williams indicated that Kay Coaching's fees came from general funds.

Earl Williams indicated that he would like to see the program continued and expanded.

* * * *

There being no further business, the meeting was adjourned. There will be no meeting in January 2020. The next meeting will be held on Wednesday, February 12, 2020.

NO SIGNATURE UNTIL APPROVED

Anne E. Williams, Chair
Neighborhood Revitalization & Development Committee

DRAFT

The City of Shaker Heights

2015 HOUSING & NEIGHBORHOOD PLAN

EXECUTIVE SUMMARY



EXECUTIVE SUMMARY

The City of Shaker Heights is known for the excellent quality of its housing stock, its attractive, Garden City landscape and its vibrant, diverse neighborhoods. These are the characteristics which draw people to the community and cause them to stay once they are here. While all cities seek to be regarded as desirable places to live, for cities like Shaker Heights where 89.7% of the property tax base is residential, and only 10.3% is commercial, maintaining strong property values is an imperative, not a choice. Housing is Product #1 in the City of Shaker Heights. Throughout the decades, the City of Shaker Heights has been the choice for home seekers looking to make a move into a community that acknowledges and recognizes the benefits – social, economic, and long-term – of an integrated, diverse suburb.

Why Housing Matters

Housing matters to us as residents, and as taxpayers. Housing matters to residents because it is typically their largest investment and they want to ensure that the investment in their homes is protected and ideally is appreciating. In addition, they want the safe, quiet enjoyment of their homes, the ability to sell their houses without incurring a loss, and a sense of community and stability in their neighborhoods. They look to the City to help them to achieve these goals. Housing very much matters—to the individual, to the family, to the neighborhood, and to the City. Housing is a critical source of revenue for both the City and the School District. The schools are the main recipients of property tax revenue, with 84.6% of these taxes going to fund school operations. The housing market impacts City revenue in two main ways:

- directly through the value of the residential property taxes the City receives; and
- indirectly through the income tax revenue received from those who choose to live in the City.

Economic Impact of Housing

The linkage between housing and economic development is well documented. In fact, the slow recovery of the national housing market has been blamed for the slow national economic recovery, as housing has traditionally been the economic driver that has brought the country out of its economic downturns. When retailers look at a city as a potential place to open a business, one of the most important factors for them is the median household income, which is of course tied to the value of the housing in a community. They recognize that the greater the amount of income in an area, the more likely that there will be disposable income available to support their business. Housing also matters to business owners looking for a place to locate because they want their employees to have access to nearby attractive, affordable housing, and they want an available pool of employees from the area.

For all these reasons, the City needs to maintain a pro-active strategy which preserves the characteristics that have made this City one of the premier places to live in the country – quality housing in a quality setting - while simultaneously keeping pace with changing market demands for a broader range of housing choices. The City's 2015 Housing and Neighborhood Plan is a critical element in our planning for our future as a community. It seeks to address the key questions of what actions by the City will have the greatest impact on stabilizing and increasing housing values. How can we build off of our existing assets? What are the best

ways to make our housing stock more competitive and to increase demand for Shaker housing? What is the City's role in meeting resident expectations regarding housing?

Housing Plan Goals

The 2015 Housing and Neighborhood Plan is aimed at providing the framework for attaining the City's goal of "High Quality, High Functioning Neighborhoods". It builds on the foundation of the 2001 Housing Plan, and identifies new recommended strategies and approaches for the City to pursue over the next five years, responding to the significant changes in the local and regional housing market since 2001.

There are three goals identified in the 2014 Housing and Neighborhood Plan:

- Attract New Residents to Shaker, Increase Demand for Houses and Increase Property Values
- Preserve Existing High Quality Housing Stock
- Increase Cohesiveness, Desirability, Attractiveness and Stability in the Neighborhoods

For each of these goals, recommendations have been made to help attain these goals. Key recommended strategies include:

- A continued comprehensive code enforcement program;
- Incentives to encourage modernization of properties, especially energy efficiency and accessibility upgrades;
- Leveraging City owned land assets to strengthen neighborhoods;
- Investment in infrastructure enhancements, such as broadband access, to make the City as a whole more competitive;
- Leveraging the City's economic development efforts to create a more vibrant retail and commercial sector that will be an attraction to potential new, as well as existing, residents;
- A neighborhood marketing, branding, and resident recruitment effort to attract a diverse population of new residents;
- Efforts to encourage and provide opportunities for current residents to remain in the community as they age; and
- Expanded collaboration with the private and non-profit sectors, and with neighborhood associations.

The 2015 Housing and Neighborhood Plan also identifies key market opportunities for the City based on changing demographic trends and housing preferences and needs. These include targeting specific population cohorts such as Millennials, Baby Boomers, immigrants, and entrepreneurs to maintain and enhance the diversity of residents, and encouraging investment, particularly in the townhouses, apartments and condos that will be demanded by many in these populations.

GOAL 1: Attract New Residents to Shaker, Increase Demand for Houses and Increase Property Values

KEY PRINCIPLES

- Shaker should enhance its ability to compete in the regional marketplace as a place to live, work, and shop by leveraging public funds to enhance its competitive position.

EXISTING PROGRAMS

- Expand marketing of city's housing initiatives and neighborhoods to attract a wide variety of new residents and educate residents
- Implement Transit Village Project in northern Moreland.
- Continue to support County down payment assistance program
- Expand infill housing program, focusing on development of new housing types
- Continue to promote transportation alternatives

NEW INITIATIVES

- Partner with private developer to construct new for sale housing at Avalon Station II on Van Aken.
- Partner with private developers to construct luxury apartments at Van Aken District.
- Expand residential tax abatement areas
- Develop incentive program aimed at encouraging people to live and work in Shaker, e.g. teachers, entrepreneurs
- Develop new resident welcome program with neighborhood groups
- Develop and implement Moreland Innovation Zone initiative aimed at revitalizing southern Moreland as a mixed use, multigenerational neighborhood and expanding high speed internet access in the area

GOAL 2: Preserve Existing High Quality Housing Stock

KEY PRINCIPLES

- ❖ Shaker should preserve its unique and architecturally significant housing and update its housing to meet current and future demand.
- ❖ Shaker should continue to enforce its codes in order to ensure people have confidence to invest and live in Shaker.

EXISTING PROGRAMS

- Maintain systematic inspections program for both rentals and owner occupied homes
- Maintain Point of Sale Escrow Program
- Maintain Certificate of Occupancy Program
- Continue to support HELP & Heritage low interest loan programs
- Use Inter-departmental forum to identify problem properties and develop solutions to resolve these issues
- Expand Shaker Renovator Program to attract more high quality rehabbers
- Maintain Private Purchase Rehab program aimed at rehabbing city owned properties
- Research partnership with a non-profit to enable the City to expand number of residents served through its technical assistance and grant programs

NEW INITIATIVES

- Develop and implement program aimed at increasing accessibility of condos, apartments and two family houses.
- Develop affordable energy efficiency financing mechanism with regional partners.
- Develop and implement Multifamily Building Reinvestment program focused on modernizing apartment buildings, particularly in the Van Aken area
- Work with local lenders to develop additional affordable home improvement financing options
- Research additional code enforcement tools to ensure compliance by out of town investors.
- Review Architectural Board of Review (ABR) design guidelines and Landmark Commission guidelines to ensure that they meet changing needs.
- Identify additional ways to encourage the repair rather than the removal of significant architectural/historical details by homeowners when correcting code violations.

GOAL 3: Increase Cohesiveness, Desirability, Attractiveness and Stability in the Neighborhoods

KEY PRINCIPLES

- ❖ Shaker should celebrate and strengthen its historically well-defined and well-beloved neighborhoods.
- ❖ Shaker should identify, celebrate, and utilize fully the special assets of each neighborhood.
- ❖ Shaker should aggressively fight blight and vacancy

EXISTING PROGRAMS

- Continue securing and monitoring of vacant properties
- Continue foreclosure monitoring & enforcement of foreclosure filing fee.
- Continue to maintain & develop relationships with lenders who own property in Shaker Heights
- Continue to work closely with subsidized housing providers to ensure quality rental housing
- Continue land banking program for blighted and obsolete properties
- Expand program to return vacant owned city lots to productive use by encouraging more creative uses and new housing types
- Maintain demolition program for distressed housing using County demolition bond grant funding whenever possible
- Expand pilot owner occupancy programs such as the deed in escrow program and the land trust program
- Work with neighborhood groups to reconfigure neighborhood community grant program to complement city Housing and Neighborhood Plan goals

NEW INITIATIVES

- Identify and implement programs to ensure that out of town landlords understand the city's rental requirements and standards.
- Explore registration of rental property managers.
- Develop & implement new initiatives aimed at improving security of vacant properties, and reducing theft related damage of vacant properties.
- Implement small scale nuisance abatement program
- Expand partnerships with non-profits to provide residents with more homebuyer education and asset building resources
- Provide leadership training and capacity building to neighborhood groups



SHAKER HEIGHTS

Memorandum

To: Members of Neighborhood Revitalization & Development Committee
From: Kamla Lewis, Director, Director of Neighborhood Revitalization
cc: Mayor David E. Weiss
Jeri Chaikin, CAO
Date: January 6, 2020
Re: **Application to Acquire City Owned Vacant Lot at 3654 Daleford Road (PPN 735-30051) for Side Lot**

Summary

The City has received an application from Gregory Huffman, 3658 Daleford Road, who is interested in acquiring the city owned vacant lot adjacent to his home in order to expand his lot. The Neighborhood Revitalization & Development (NRD) Committee is being asked to consider this application and make a recommendation as to whether City Council should approve the sale of the vacant lot located at 3654 Daleford Road (PPN 735-30051) to Mr. Huffman.

Background & Discussion

Proposal Summary

- **Applicant** : Gregory Huffman, 3658 Daleford Road
- **Proposal summary** : to purchase this vacant lot, and landscape it to use it as an enlarged side yard, at a cost of approx. \$5,906. He proposes to use contractors to do the work. (see attached drawings)
- **Price offered** : \$50.00

Staff Review of Application

- The applicant's property is not in foreclosure, he is current in his property taxes, and has had no criminal nuisance activity complaints. He has no outstanding Housing or Zoning Code violations. He has owned his home in Shaker Heights since September 2019, and is owner occupant of this two family rental property.
- The applicants' proposal is consistent with the City and neighborhood goal of expanding the size of lots in the neighborhood to enable households to have larger yards without selling their home and moving elsewhere. Larger lots typically command higher prices at sale as well. Sale to Mr. Huffman would return the vacant lot to productive use and tax revenue generation.
- The City has no redevelopment plans for this vacant lot.

- Staff considers that the use of the lot as described would be an improvement over it being maintained by the City as a vacant lot. It currently costs the City approx. \$615 per year to maintain a vacant lot.

Background Information

- In May 2008, the City adopted a Side Lot Program to make City owned vacant lots available to the adjacent neighbors. The goal of the program was to encourage adjacent neighbors to acquire these lots to make capital improvements to the property that would increase tax value, such as construction of a house addition or garage, landscaping, etc.
- Applications are accepted on a “first quality, first served” **basis**. Proposals that are approved by NRD will go to City Council for final approval.
- There is no set price for side lots under the Program; pricing is negotiable based on lot size, location, configuration, planned improvements, etc.
- If the NRD recommends acceptance of this application, and it is approved by Council, the City will enter into an agreement with the applicant that will include all of the conditions and the buyer’s responsibilities. The buyer will have to seek Planning Commission (CPC) approval for the consolidation of the lots. If there are variance requirements, they may also have to seek Zoning Board approval. Only once all these conditions are met would the property be transferred.
- The property was acquired by the City in March 2019 through a tax foreclosure. The two family house that had previously stood on this lot was demolished by the City in 2017.
- Through its vacant lot program, the City so far has sold eighteen (18) vacant lots:

Year	# lots	Price	Buyer	Street	Use
2003	2	\$1.00 each	Rysar	Lindholm	New houses
2011	3	\$1.00 each	Zaremba	Strathavon	New houses
2011	1	\$1,000	Adjacent neighbors	Ashwood	Two side yards
2011	1	\$100	Neighbor	Enderby	Side yard
2011	1	\$1,000	Heights Christian Church	Daleford	Community garden
2012	1	\$50	Neighbor	Menlo	Side Yard
2013	1	\$50	Neighbor	Riedham	Side yard
2013	1	\$1,000	Neighbor	Daleford	Side Yard
2014	1	\$1,000	Neighbor	Avalon	Side Yard
2014	1	\$100	Neighbor	Albion	Side Yard
2017	1	\$50	3 adjacent neighbors	Palmerston	Side Yards

Year	# lots	Price	Buyer	Street	Use
2019	1	\$1	Knez	Hildana	New house
2019	1	\$1	Knez	Ludgate	New house
2019	1	\$1	Neighbor	Winchell	Side yard
2020	1	\$50	Neighbor	Avalon	Side yard

- One additional vacant lot on Rolliston is being leased to a community group for use as a Community Garden, another lot on Winchell was approved for sale to a neighbor in May 2019 and another on Avalon in August 2019.

Recommendation

Staff recommends that the Huffman application to acquire the City owned vacant lot located at 3654 Daleford Road (PPN 735-30051) for \$50.00 and utilize it as an expanded side yard, be recommended by the NRD to Council.



Huffman home at 3658 Daleford

Vacant lot at 3654 Daleford

Proposed Improvements





SHAKER HEIGHTS

Memorandum

To: Mayor David E. Weiss
From: Kamla Lewis, Director of Neighborhood Revitalization
cc: Jeri Chaikin, CAO
Date: January 6, 2020
Re: **Proposed Changes to City 's Side Lot Program for 2020**

Summary

The Mayor has set a priority goal for 2020 of transferring more city owned vacant lots to neighbors to use as side lots, and by so doing, reducing the cost of ongoing maintenance to the City, and increasing the tax base by returning these vacant lots to tax paying status. The pilot program described below is aimed at accomplishing both these goals, and has been reviewed with the Law and Planning Departments. Approval by the Neighborhood Revitalization and Development (NRD) Committee is requested.

Background & Discussion

Background Information

- In May 2008, the City adopted a Side Lot Program to make City owned vacant lots available to the adjacent neighbors. The goal of the program was to encourage adjacent neighbors to acquire these lots to make capital improvements to the property that would increase tax value, such as construction of a house addition or garage, landscaping, etc.
- **The City currently owns 222** vacant lots scattered throughout the city, but mostly concentrated in the Moreland and Lomond neighborhoods. There are also 185 privately owned vacant lots, 40 of which are tax delinquent and may eventually transition to the City through the tax foreclosure process.
- There has been an **80% increase in city owned lots since 2013**, with an associated increase in the cost of annual maintenance by Public Works.
- Each city owned vacant lot costs approx. \$615 per year for maintenance, i.e. \$136,530 annually for the current 222 lots.
- The Recreation Dept. landscapes and fences vacant lots so that they do not detract from the neighborhood. Average annual cost for 2015-2017 = \$47,458 (avg. \$1,540 p/lot for landscaping and \$1,147 p/lot for fencing. Total = \$2,687 per lot)
- We acquire on average approx. 10-15 properties per year. In 2019 we acquired 17 vacant lots. Currently 22 vacant lots are in the foreclosure pipeline for potential acquisition.

- Since 2008, we have sold 11 city vacant lots to neighbors as side lots, have 4 applications that have been approved by Council and are awaiting transfer, and 4 applications that are pending review. We have sold 7 vacant lots to developers for new construction, have leased 1 vacant lot to a community group as a community garden, sold 1 to a church for use as a community garden, and turned 4 vacant lots into park space.

Current Side Lot Acquisition Process

- Applications are accepted on a “first quality, first served” basis. Proposals that are approved by the Neighborhood Revitalization and Development and the Finance and Administration Committees go to City Council for final approval.
- There is no set price for side lots under the Program; pricing is negotiable based on lot size, location, configuration, planned improvements, etc. Lots have sold from \$1-\$1000.
- If the application is approved by Council, the City enters into an agreement with the applicant that includes all of the conditions and the buyer’s responsibilities. The buyer will have to seek Planning Commission (CPC) approval for the consolidation of the lots. If there are variance requirements, they may also have to seek Zoning Board approval. Once these conditions are met the property is transferred.
- The current process takes on average 6-8 months from initial submission of an application to transfer of properties, and then 6-12 months of monitoring for completion of improvements.
- The average amount of investment in improving the side lots acquired by neighbors has been \$1,217.

Proposed Changes to the Side Lot Program for 2020

Introduce a “limited time only for 2020” program with the following changes:

- **Reduce the cost of acquisition to neighbors :**
 - Remove requirement that capital improvements be made to the property. Reduces staff time for monitoring.
 - Waive \$75 fee for taking the consolidation request to the Planning Commission.
- **Simplify the acquisition process :**
 - Have a set price of \$1 per lot rather than residents proposing a price.
 - Only have Council review and approval of applications, unless the applications require complex splits of the parcel, instead of current practice of having the acquisition reviewed by NRD and Finance and then going to Council for approval,
- **Simplify the lot consolidation process for those acquiring the lots :**
 - Have staff rather than buyer take the consolidation request to the Planning Commission for approval and not require a survey to be completed before going to the Planning Commission. This enables the application to be reviewed at the Planning Commission right after a Council meeting, rather than waiting several months. Added staff time.
 - Issue an RFP to surveyors and provide buyers with a list of surveyors who have agreed to a set price and timeframe for carrying out consolidation

surveys. Added staff time to locate potential contractors and monitor the contract.

- **Increase marketing of program** : There has only been passive marketing of the program by having the lots on the website. Program could be advertised in Shaker Life, highlight stories about how neighbors used their expanded lots; marketed to realtors so they can advise buyers who want more space than our lots typically have, etc. Website should include an online application form and a map showing the location of the available lots.

Recommendation

Neighborhood Revitalization and Development Committee approve this pilot program for 2020.