

Upper Arlington Tax Incentive Review Council
Monday, August 10 2020, 10:45 a.m.
2019 Compliance Review
Agenda

1. Call meeting to order
2. Approve August 12, 2019 meeting minutes
3. Review Community Reinvestment Area Agreements (Dublin City Schools)
 - a. GK Knightsbridge, LTD (075-000028) 5005 Horizons Drive, Suite 100
 - b. G & B Ventures (075-000029) 5005 Horizons Drive, Suite 200
 - c. 5007 Arlington Falls, LLC (075-000030, 075-000031 and 075-000032) 5007 Horizons Drive
4. Review TIF projects
 - a. Kingsdale West Tax Incentive Fund – (UA City Schools)
 - b. Lane Avenue Tax Incentive Fund – (UA City Schools)
 - c. Lane Avenue Mixed Use – (UA City Schools)
 - d. Arlington Crossing Incentive District – (UA City Schools)
 - e. Kingsdale Core - (UA Schools)
 - f. Riverside North & South – (UA Schools)
 - g. Arlington Centre (Columbus Aesthetic & Plastic Surgery) - (UA City Schools)
 - h. Tremont Road (Ohio Health) – (UA Schools)
 - i. Lane Northwest (Heartland Bank) – (UA Schools)
 - j. Lane II – (UA Schools)
 - k. Horizons - (Dublin City Schools)
5. Other Business
6. Adjourn

1 2019 FRANKLIN COUNTY TAX INCENTIVE REVIEW COUNCIL
2 ANNUAL MEETING

3 - - -

4
5 In the Matter of:
6 Upper Arlington
7 Community Reinvestment Area
8 Tax Increment Financing
9 Tax Incentive Review Council
10

11 - - -

12 TRANSCRIPT OF PROCEEDINGS

13 - - -

14 Monday, August 12, 2019
15 9:05 a.m.
16 Franklin County Commissioners'
17 Hearing Room
18 373 South High Street
19 26th Floor
20 Columbus, Ohio 43215

21 - - -

22 TRACI E. PEOPLES
23 PROFESSIONAL COURT REPORTER

24 - - -

ANDERSON REPORTING SERVICES, INC.
1421 West Third Avenue
Columbus, Ohio 43212
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1 APPEARANCES:

2 Michael Stinziano, Franklin County Auditor

3 Kelan Craig, Franklin County Commissioners Appointee

4 Toni Cunningham, Franklin County Commissioners
5 Appointee

6 Michael Kinninger, Franklin County Commissioners
7 Appointee

8 Joshua Roth, Franklin County Economic Development
9 and Planning Department

10 Jim Schimmer, Franklin County Director of Economic
11 Development and Planning

12 Suzanne Beach, Upper Arlington Schools

13 Mike Drennen, Upper Arlington TIRC Committee

14 Joseph Henderson, Upper Arlington Economic
15 Development Director

16 Tyson Hodges, Assistant Treasurer, Dublin City
17 Schools

18 Brent Lewis, Finance Director, City of Upper
19 Arlington

20 Mike Szolosi, Jr., Upper Arlington TIRC Committee

21 - - -

22 ALSO PRESENT:

23 Shelley May, Franklin County Auditor's Office
24 Kelly Washington, Franklin County Auditor's Office

- - -

1 MONDAY MORNING SESSION
2 August 12, 2019
3 9:05 a.m.

4 - - -

5 P R O C E E D I N G S

6 - - -

7 BE IT REMEMBERED THAT, on the 12th day of
8 August, 2019, this cause came on for meeting before
9 Franklin County Tax Incentive Review Council. And,
10 the parties appearing in person and/or by counsel,
11 as hereinafter set forth, the following proceedings
12 were had:

13 - - -

14 CHAIRPERSON STINZIANO: Good morning.
15 Welcome to the 2019 Commissioners Tax Incentive
16 Review Council Meeting. Today is August 12, 2019.
17 I am Michael Stinziano, the Franklin County Auditor,
18 and the statutory chairperson for the TIRC.

19 First off this morning, we will have the
20 City of Upper Arlington. Welcome.

21 I'd like to go start by going around the
22 room and introducing ourselves and verify that we do
23 have a quorum.

24 MR. SZOLOS: Good morning. Mike
Szolosi, Jr., Upper Arlington TIRC Committee.

1 MR. DRENNAN: Michael Drennen, Upper
2 Arlington TIRC Committee.

3 MR. CRAIG: Kelan Craig, Franklin County
4 Commissioners Appointee.

5 CHAIRMAN STINZIANO: Auditor Stinziano.

6 MS. CUNNINGHAM: Toni Cunningham,
7 Franklin County Commissioners Appointee.

8 MR. KINNINGER: Michael Kinninger,
9 Franklin County Board Commissioners Appointee.

10 MR. SCHIMMER: Good morning. I'm Jim
11 Schimmer. I'm Franklin County's Director of
12 Economic Development and Planning.

13 MR. ROTH: Josh Roth, Senior Program
14 Coordinator with Franklin County Economic
15 Development and Planning.

16 MS. WASHINGTON: Kelly Washington,
17 Franklin County Auditor.

18 MS. MAY: Shelley May, County Auditor
19 support.

20 MR. LEWIS: Brent Lewis, Finance
21 Director, City of Upper Arlington.

22 MR. HENDERSON: Joe Henderson, Economic
23 Development Director, City of Upper Arlington.

24 CHAIRPERSON STINZIANO: Okay. The first

1 item we have on the agenda is the review of last
2 year's minutes, dated July 18, 2018.

3 Are there any necessary corrections
4 and/or changes to the minutes?

5 (No audible response.)

6 CHAIRPERSON STINZIANO: Being none, is
7 there a motion to approve the minutes?

8 MR. KINNINGER: So moved.

9 CHAIRPERSON STINZIANO: They are moved.

10 Is there a second?

11 MR. CRAIG: Second.

12 CHAIRPERSON STINZIANO: It has been moved
13 and seconded. I will be abstaining because I wasn't
14 there, so I can't verify it. I'm sure it's an
15 accurate reflection of the meeting, but I wasn't
16 there.

17 All those in favor?

18 (Vote taken.)

19 CHAIRPERSON STINZIANO: Any opposed?

20 (No audible response.)

21 CHAIRPERSON STINZIANO: And, again, I
22 abstain from this vote.

23 Next we will now do the CRA review.

24 We'll review and vote on the status of each CRA

1 abatement agreement for tax year 2018.

2 Who will be presenting the report?

3 MR. HENDERSON: I will be.

4 So first we'll --

5 CHAIRPERSON STINZIANO: Can you step up
6 to the microphone?

7 MR. HENDERSON: Sure.

8 CHAIRPERSON STINZIANO: It's there for
9 something, but it seems more official.

10 MR. HENDERSON: More official.

11 MS. WASHINGTON: Joe, the school hasn't
12 been introduced.

13 MR. HODGES: Oh, I'm sorry.

14 Tyson Hodges, Assistant Treasurer, Dublin
15 Schools.

16 MR. HENDERSON: So you do have a copy of
17 the CRA reports, the TIRCs. There are three of them
18 this year. Two of them will be expiring.

19 In the order on the agenda -- we wanted
20 to keep everybody on their toes -- it's actually the
21 reverse order from what is in the packets. And we
22 apologize for that.

23 But if you look at it, the first one --
24 Actually, it's even more out of order. The first

1 one, which is G.K. Knightsbridge, the second one
2 inside the packet, this will be their last year.
3 They are doing well meeting the numbers. They're
4 exceeding their numbers. Not much to say on that
5 one, other than this will be the last year for
6 Camelot Dental Group. That is up here at the
7 Arlington Falls building.

8 The second one, which is GME Ventures --
9 GME Ventures. Again, this is another one where
10 they're --

11 MS. WASHINGTON: Joe, I think you want to
12 vote on each one.

13 MR. HENDERSON: Do each one? Okay.

14 CHAIRPERSON STINZIANO: Are there any
15 questions or comments?

16 (No audible response.)

17 CHAIRPERSON STINZIANO: If there is no
18 further review, I'd like to get a motion.

19 MS. CUNNINGHAM: I have a question.

20 MR. HENDERSON: Yes.

21 MS. CUNNINGHAM: I have a question about
22 the new jobs. There were 17 in the agreement and 13
23 created. Or am I misreading that?

24 MR. HENDERSON: No, You're reading that

1 correctly. Yeah, they're down in the number of jobs
2 they needed, but their payroll exceeds. And so, for
3 us, that's acceptable.

4 MS. CUNNINGHAM: Okay.

5 CHAIRPERSON STINZIANO: Any other
6 questions or comments?

7 (No audible response.)

8 CHAIRPERSON STINZIANO: Being none, is
9 there a motion to accept that report?

10 MR. CRAIG: So moved.

11 CHAIRPERSON STINZIANO: So moved.

12 Is there a second?

13 MR. SZOLOS: Second.

14 CHAIRPERSON STINZIANO: It's been moved
15 and seconded.

16 All those in favor?

17 (Vote taken.)

18 CHAIRPERSON STINZIANO: Any opposed?

19 (No audible response.)

20 CHAIRPERSON STINZIANO: On to the next
21 one.

22 MR. HENDERSON: The next one is G & B
23 Ventures. Teamwork Solutions and Einformatics are
24 the companies in this space.

1 This is, again, their last year. They
2 are doing well, number-wise. Their jobs have
3 increased, payroll has increased.

4 The issue is an issue that comes up every
5 year with this one, is they're delinquent in their
6 taxes. Normally -- We have sent notice to them.
7 Normally, they get the reminder that they need to
8 pay their taxes. And in past years, we've had to --
9 you know, after this meeting, we've always received
10 it. And I think my approach -- and I think Brent
11 probably would second this idea of putting them --
12 allowing them to give them 30 days or so to pay it.
13 And then if not, refer to the CRA. This is their
14 last year.

15 MR. LEWIS: Yeah. And, as Joe said, we
16 have proactively reached out to them a couple of
17 weeks ago. And I think we have heard back from
18 them. They are working on it. One was they were
19 refinancing.

20 MS. MAY: They're refinancing their
21 property.

22 MR. LEWIS: So we have reached out to
23 these people already to hopefully get that.

24 But, like I said, this was their -- was

1 their final year of the CRA. So we are still trying
2 to get payment from them.

3 MR. KINNINGER: I saw last year we had
4 this issue, and we recommended a letter be sent when
5 the -- saying they would be subject to termination
6 if they didn't pay within 30 days. Did they?

7 MR. HENDERSON: They did.

8 MR. KINNINGER: Okay. So they did meet
9 that requirement?

10 MR. HENDERSON: Yeah. And for this year,
11 we were proactive, and we sent a letter before this
12 meeting. It's still an issue we had to send the
13 letter -- give them the 30 days.

14 MR. LEWIS: And we did. Yeah.
15 Unfortunately, there's nothing to terminate, because
16 this is their last year.

17 MS. WASHINGTON: There's your clawback.

18 MR. DRENNEN: So on the delinquent taxes,
19 so the annual tax is 31. The delinquent is 36. Is
20 that penalties? Or is that still a portion of the
21 previous year?

22 MR. LEWIS: Penalties are included in
23 that.

24 MR. DRENNEN: Okay. So that's still --

1 that's a full year plus penalties.

2 MR. HENDERSON: So this -- I don't
3 believe -- This is the amount that matches with
4 that.

5 MR. SZOLOSİ: I missed what this lady had
6 said, something about clawing back. So maybe the
7 letter says, "If you don't pay within 30 days, we do
8 that clawback provision."

9 CHAIRPERSON STINZIANO: Have they already
10 sent the letter?

11 MR. HENDERSON: We've sent a letter
12 already.

13 MR. SZOLOSİ: So I think we send another
14 one.

15 MR. HENDERSON: Yeah. It doesn't mean
16 what we can't. This was, like, "Pay your taxes"
17 type of letter.

18 CHAIRPERSON STINZIANO: Understood.

19 MR. SZOLOSİ: I think we this time
20 threaten the clawback.

21 MR. KINNINGER: Did someone say that this
22 property is currently for sale?

23 MR. SZOLOSİ: No, refinance.

24 MR. DRENNEN: It's being refinanced.

1 MR. SZOLOSÍ: Well, if they refinance it,
2 they'll have to pay the taxes on the refinance;
3 right? I mean --

4 MS. WASHINGTON: Yeah, the mortgage
5 company will.

6 MR. HENDERSON: I believe we're going to
7 get the taxes. Whether they refinance it or not, I
8 think it's coming in the next 30 days anyway.

9 CHAIRPERSON STINZIANO: Any other
10 questions or comments?

11 (No audible response.)

12 CHAIRPERSON STINZIANO: Thank you for the
13 report.

14 Being none, is there a motion for
15 approval?

16 MR. DRENNEN: Aye.

17 MR. SZOLOSÍ: So moved.

18 CHAIRPERSON STINZIANO: Thank you.

19 Did you want to make the motion to --

20 MR. SZOLOSÍ: What are we doing about the
21 letter? Are we sending the letter?

22 MR. HENDERSON: We can, if the Board
23 would like us to send another letter between their
24 refinancing and the first letter being sent.

1 MR. SZOLOSİ: Yeah. I'll move that we
2 send a second letter threatening that we're going to
3 claw back the abatement if they don't pay the taxes
4 within 30 days.

5 MR. KINNINGER: How far back do we make
6 the clawback?

7 MR. SZOLOSİ: One year.

8 MR. KINNINGER: The last ten years?

9 Or --

10 MR. SZOLOSİ: One year.

11 MR. DRENNEN: Or what does the TIRC
12 agreement read? How does the agreement read?

13 MR. HENDERSON: I believe it's -- I don't
14 know how -- if there's even a clawback provision in
15 it. I'm sure there is, but I don't know what it is
16 off the top of my head.

17 MS. WASHINGTON: Well, if it is, it's
18 that if they don't pay the taxes, they run the risk
19 of losing the benefit.

20 MR. SZOLOSİ: But, yeah, I would believe
21 it would just be one year.

22 MS. WASHINGTON: One year.

23 MR. DRENNEN: I don't think you'd go
24 after --

1 MR. SZOLOSZI: All of the years.

2 MR. DRENNEN: So, yeah.

3 MS. WASHINGTON: It's the current year
4 that's delinquent.

5 MR. DRENNEN: Yeah.

6 MR. HENDERSON: We can do that.

7 CHAIRPERSON STINZIANO: So there's been a
8 motion for a letter regarding the clawback for the
9 time period.

10 Is there a second?

11 MR. DRENNEN: Second.

12 CHAIRPERSON STINZIANO: It's been moved
13 and seconded.

14 All those in favor?

15 (Vote taken.)

16 CHAIRPERSON STINZIANO: Any opposed?

17 (No audible response.)

18 CHAIRPERSON STINZIANO: All right.

19 I'll accept an amended motion to the
20 report with that letter included.

21 I've amended the letter, so now I want to
22 do the whole report.

23 MR. CRAIG: So moved.

24 CHAIRPERSON STINZIANO: Is there a second

1 to the whole --

2 MR. CRAIG: Second.

3 CHAIRPERSON STINZIANO: It's been moved
4 and seconded, as amended.

5 All those in favor?

6 (Vote taken.)

7 CHAIRPERSON STINZIANO: Any opposed?

8 (No audible response.)

9 CHAIRPERSON STINZIANO: Thank you.

10 The final one.

11 MR. HENDERSON: The final one is for the
12 5007 Arlington Falls. This is UBS.

13 A couple of good things on this report.
14 So they have one more year left. There is --
15 They're showing delinquent here, but we have --
16 We've sent them a letter. We've heard back from
17 them that there was an issue with their address of
18 where their mailings were going out to. They
19 switched mailing address. And they have told us
20 they have taken care of it. So they do not have any
21 delinquency.

22 This company was -- The last couple of
23 years, there was some fear of them leaving after
24 this agreement ended. We have heard that they have

1 signed a new long-term lease. They are investing in
2 the facility. They will be adding more people.
3 This is a great success story for UBS at Arlington
4 Falls.

5 CHAIRPERSON STINZIANO: Thank you for the
6 report and update.

7 Any questions or comments?

8 MR. SZOLOSÍ: I suggest we do a similar
9 motion on this one. And I appreciate you've already
10 got confirmation from them saying they're sending
11 the taxes. I'd give it a week and then check. But
12 if you haven't --

13 MS. MAY: They have.

14 MR. SZOLOSÍ: They have?

15 MS. MAY: They've paid.

16 MR. SZOLOSÍ: Oh, that's wonderful. I'll
17 withdraw that.

18 CHAIRPERSON STINZIANO: Any other
19 questions or comments?

20 Being none, is there a motion to accept
21 the report and find them in compliance?

22 MS. CUNNINGHAM: So moved.

23 MR. KINNINGER: I'll second.

24 CHAIRPERSON STINZIANO: It's been moved

1 and seconded.

2 All those in favor?

3 (Vote taken.)

4 CHAIRPERSON STINZIANO: Any opposed?

5 (No audible response.)

6 CHAIRPERSON STINZIANO: That wasn't so
7 bad.

8 Is there any other business before us or
9 any updates?

10 MR. ROTH: Did we discuss the TIF
11 reports?

12 CHAIRPERSON STINZIANO: Sorry. I
13 apologize. I was in the wrong place.

14 We will now review and vote on Upper
15 Arlington's TIF District Status Report for Tax Year
16 2018 and acknowledge the auditor's delinquent tax
17 parcel included in the TIRC packet.

18 Who will be presenting the TIF report for
19 us this morning?

20 MR. LEWIS: So as Shelley just informed
21 me, we'll go through all of the Upper Arlington
22 schools ones first. And then there's one in the
23 Dublin School District, which I have them broken out
24 in your spreadsheet here. I won't, unless you want

1 me to, go through these one-by-one.

2 All of our TIFs are doing very, very
3 well. We have -- I think we're up to 37, something
4 like that. They're all doing very, very well and
5 successful.

6 The Upper Arlington ones, there are a
7 few, as I noted, that have delinquent parcels in
8 them. Some of these are from -- are ones involved
9 in the CRAs that we just went through.

10 But you're going to see the largest one
11 is on letter (D). There's a delinquent parcel for
12 three hundred and -- almost \$319,000. We have
13 contacted all of these people as well. This is a
14 very large university hospital in the area. We're
15 not mentioning any names, but they have been
16 contacted. There apparently has been a mixup on
17 some of their tax payments on several of their
18 properties, and those are being addressed.

19 So unless there's any questions on any
20 specific --

21 MR. SZOLOS: What about on (D)? Why is
22 that one behind?

23 MR. LEWIS: I believe that's a
24 residential property as well. That person -- that's

1 the one we did not send a letter to the residential
2 property. TIFs are a little bit different.
3 Obviously, I think all of you know this. They're
4 different than CRAs. There's not really any
5 incentive. We're not giving any type of abatement
6 to them.

7 Being that this was a personal residence,
8 we did not send them a letter, as opposed to the
9 businesses within the community. That's not to say
10 that we can't, but it's just a little bit different
11 situation.

12 CHAIRPERSON STINZIANO: Any additional
13 questions or comments?

14 (No audible response.)

15 CHAIRPERSON STINZIANO: And the staff
16 preference is we vote on the Upper Arlington one and
17 then do the Dublin?

18 MS. WASHINGTON: Yes.

19 CHAIRPERSON STINZIANO: Okay. Being
20 there are no other questions or comments, is there a
21 motion to accept the TIF report for the Upper
22 Arlington School District?

23 MR. DRENNEN: So moved.

24 MR. KINNINGER: Second.

1 CHAIRPERSON STINZIANO: Moved and
2 seconded.

3 All those in favor?

4 (Vote taken.)

5 CHAIRPERSON STINZIANO: Any opposed?

6 (No audible response.)

7 CHAIRPERSON STINZIANO: Next we will do
8 the Dublin.

9 MR. LEWIS: So the last one I want to
10 talk about is (J), the Horizons TIF. As you can
11 see, it has done really well. There's about a
12 \$2.1 million fund balance sitting in there, which
13 we're about to spend between this year and next year
14 on a big project we have going on on Henderson Road.
15 It will pretty much all be spent, which is what it's
16 designed to do.

17 As you can see here, there is some
18 delinquent parcels in the TIF. Most of these just
19 were just discussed through the CRA. They're in the
20 CRA and TIF in this area.

21 And as we said before, we sent a letter,
22 kind of "we just need action on some of these
23 parcels" as well and now we're attempting to resolve
24 this.

1 But, once again, the TIF is not the
2 abatement portion of it. We would -- Like I said,
3 we are using it for projects in that area.

4 MR. DRENNEN: Is that the road -- Is that
5 Henderson Road there, that little strip?

6 MR. LEWIS: Yes.

7 MR. DRENNEN: Okay. So do we expend more
8 than the \$2 million?

9 MR. LEWIS: We do.

10 MR. DRENNEN: Yeah, okay. That's the
11 City --

12 MR. LEWIS: That's split between TIF and
13 City fees.

14 MR. DRENNEN: Does Dublin share in that
15 cost?

16 MR. LEWIS: They do not, no.

17 MR. SZOLOS: Have you reached out to
18 these folks as to why their taxes aren't being paid?

19 MR. LEWIS: Yes. This is -- These are
20 the same group that we just talked about in the CRA.

21 MR. SZOLOS: Oh, okay. Yeah.

22 MS. MAY: I believe 29 -- Parcel 29 is
23 delinquent still, but 30, 31 and 32 have been paid.

24 MR. KINNINGER: And 29 is the company we

1 discussed previously.

2 MS. MAY: Yes.

3 CHAIRPERSON STINZIANO: Anybody have any
4 other questions or comments?

5 (No audible response.)

6 CHAIRPERSON STINZIANO: Being none, is
7 there a motion to accept this report?

8 MR. KINNINGER: So moved.

9 MR. CRAIG: Second.

10 CHAIRPERSON STINZIANO: So moved and
11 seconded.

12 All those in favor?

13 (Vote taken.)

14 CHAIRPERSON STINZIANO: Any opposed?

15 (No audible response.)

16 CHAIRPERSON STINZIANO: Those reports are
17 accepted.

18 Now I will jump down to whether or not
19 there is any other business of the Upper Arlington
20 TIRC.

21 (No audible response.)

22 CHAIRPERSON STINZIANO: Being none, we
23 are adjourned.

24 - - -

1 And, thereupon, the proceeding was
2 concluded at approximately 9:20 a.m.

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C-E-R-T-I-F-I-C-A-T-E

I do hereby certify that the foregoing is a true, correct and complete written transcript of the proceedings in this matter, taken by me on the 12th day of August, 2019, and transcribed from my stenographic notes.

Traci E. Peoples

TRACI E. PEOPLES
Professional Reporter and Notary Public
in and for the State of Ohio.

My Commission Expires July 15, 2024.



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RECORD OF RESOLUTIONS

CITY OF UPPER ARLINGTON

STATE OF OHIO

RESOLUTION NO. 18-2019

A RESOLUTION TO ACCEPT THE RECOMMENDATIONS OF THE UPPER ARLINGTON TAX INCENTIVE REVIEW COUNCIL

WHEREAS, the Tax Incentive Review Council (TIRC) is responsible to review all Community Reinvestment Area Agreements and Tax Increment Financing Agreements within the City of Upper Arlington and make recommendations upon their compliance to the terms of the agreement; and

WHEREAS, the TIRC held its meeting on August 12, 2019 for review of compliance in calendar year 2018 and made recommendations thereupon; and

WHEREAS, as outlined in the Economic Development Director's Staff Report for October 7, 2019 the TIRC found 11 in substantial compliance and 1 out of compliance; and

WHEREAS, the administration of CRA Agreements allows the City of Upper Arlington to modify terms and conditions of the agreement when there is non-compliance;

NOW, THEREFORE, BE IT RESOLVED by the Council of the City of Upper Arlington, Ohio:

SECTION 1. The City of Upper Arlington accepts the recommendation of the TIRC from their August 12, 2019 meeting.

SECTION 2. That the City Manager, Finance Director, and the City Attorney are hereby authorized to take all actions, including the execution of all documents or amendments, necessary to enter into, implement, and administer the Agreement and that are not substantially inconsistent with this Ordinance.

SECTION 3. That this Resolution shall take effect at the earliest date allowed by law.

ADOPTED: October 14, 2019

Kj Brennan
President of Council

ATTEST:

Ashley M. Ellrod
City Clerk

I, Ashley Ellrod, Clerk of Upper Arlington, Ohio, do hereby certify that the above is a true and correct copy.

Ashley M. Ellrod
City Clerk

CERTIFICATE OF POSTING

I, Ashley Ellrod, Clerk of the City of Upper Arlington, Ohio, do hereby certify that publication of the foregoing was made by posting a true copy of Resolution No. 18-2019 at the most public place in said corporation as determined by the Council, the Municipal Building, 3600 Tremont Road, for a period of ten (10) days commencing October 15, 2019.

Ashley M. Ellrod
City Clerk of the City of Upper Arlington

Vote Slip

Sponsor: Hoyle

Date Introduced: October 14, 2019

Reading Date(s): October 14, 2019

Voting Aye: Unanimous

Voting Nay:

Abstain:

Absent:

Date of Passage: October 14, 2019

City Council Conference Session/Other Review: October 7, 2019

Other: Effective Upon Adoption

CITY OF UPPER ARLINGTON
Review of TIF Projects as of December 31, 2019

a) Kingsdale West – Progress Report (Upper Arlington City Schools)

- TIF Fund
- Beginning Fund Balance = \$199,555
- Revenue to the Fund = \$43,943 (PILOT payments; Homestead & Rollback)
- Expenditures = \$496
- Ending Fund Balance = \$243,002

- Obligations of Revenue: The City is evaluating additional improvements in this area.

b) Lane Avenue – Progress Report (Upper Arlington City Schools)

- TIF Fund
- Beginning Fund Balance = \$376,524
- Revenue to the Fund = \$110,661 (PILOT payments)
- Expenditures = \$576,249 (\$575,000 capital – City improvements associated with Lane II project)
- Ending Fund Balance = \$10,936

- Obligations of Revenue: The City is evaluating additional improvements in this area.

c) Lane Avenue Mixed Use – Progress Report (Upper Arlington City Schools)

- TIF Fund
- Beginning Fund Balance = \$1,285,806
- Revenue to the Fund = \$1,310,375 (\$950,375 PILOT payments; \$360,000 advance from City's General Fund)
- Expenditures = \$1,949,197 (includes \$360,531 for repayment of debt; and \$418,076 in revenue sharing with UA Schools; \$1,163,233 capital – City improvements associated with Lane II project and purchase of adjacent property for public parking)
- Ending Fund Balance = \$646,984

- Obligations of Revenue: Repayment of issued debt (\$8,332,600), revenue sharing with Upper Arlington Schools, repayment of advance from City's General Fund (\$360,000).

d) Arlington Crossing Incentive District – Progress Report (Upper Arlington City Schools)

- TIF Fund
- Beginning Fund Balance = \$615,199
- Revenue to the Fund = \$145,625 (PILOT payments; Homestead & Rollback)
- Expenditures = \$2,192
- Ending Fund Balance = \$758,632

- Obligations of Revenue: The City is evaluating additional improvements in this area.

e) Kingsdale Core – Progress Report (UA City Schools)

- TIF Fund
- Beginning Fund Balance = \$190,922
- Revenue to the Fund = \$1,374,422 (PILOT payments)
- Expenditures = \$1,213,730 (includes \$268,850 for repayment of debt; \$744,880 in revenue sharing with UA Schools, and; \$200,000 repayment of an advance from the City's General Fund)
- Ending Fund Balance = \$351,614

- Obligations of Revenue: Repayment of issued debt (\$4,040,700), revenue sharing with Upper Arlington Schools, and repayment of advances for the City's General Fund (\$518,000).

f) Riverside North and South – Progress Report (Upper Arlington City Schools)

- TIF Fund
- Beginning Fund Balance = \$65,746
- Revenue to the Fund = \$23,503 (PILOT payments)
- Expenditures = \$265
- Ending Fund Balance = \$88,984

- Obligations of Revenue: The City is evaluating additional improvements in these areas.

g) Arlington Centre (Columbus Aesthetic and Plastic Surgery) – Progress Report (Upper Arlington City Schools)

- TIF Fund
- Beginning Fund Balance = \$19,071
- Revenue to the Fund = \$12,048 (PILOT payments)
- Expenditures = \$136
- Ending Fund Balance = \$30,983

- Obligations of Revenue: The City is evaluating additional improvements in these areas.

h) Tremont Road (Ohio Health) – Progress Report (Upper Arlington City Schools)

- TIF Fund
- Beginning Fund Balance = \$5,088
- Revenue to the Fund = \$56,772 (PILOT payments)
- Expenditures = \$40,641 (includes \$40,000 repayment of an advance from the City's General Fund)
- Ending Fund Balance = \$21,219

- Obligations of Revenue: Repayment of advance from City's General Fund (\$251,135)

i) West Lane - Northwest (Heartland Bank) – Progress Report (Upper Arlington City Schools)

- TIF Fund
- Beginning Fund Balance = \$0
- Revenue to the Fund = \$0
- Expenditures =
- Ending Fund Balance = \$0

- Passed via Ordinance 24-2018 on April 9, 2018.
- Construction completed in mid-2019.
- Obligations of Revenue: Repayment of advance from City's General Fund (\$218,200)

j) Lane II – Progress Report (Upper Arlington City Schools)

- TIF Fund
- Beginning Fund Balance = \$0
- Revenue to the Fund = \$19,141,314 (Bond proceeds)
- Expenditures = \$19,024,574 (capital – Lane II project)
- Ending Fund Balance = \$116,740

- Passed via Ordinance 42-2019 on June 17, 2019
- Construction expected to be completed in 2021.
- Obligations of Revenue: Repayment of issued bonds.

k) Horizons – Progress Report (Dublin City Schools)

- TIF Fund
- Beginning Fund Balance = \$2,114,084
- Revenue to the Fund = \$1,546,423 (PILOT payments)
- Expenditures = \$3,365,807 (\$3,365,807 capital – Henderson Rd. project)
- Ending Fund Balance = \$288,067

- Obligations of Revenue: Repayment of advance from City’s General Fund (\$1,200,000)
- Current delinquent parcels:
 - (2019 full year): 075-000029 (\$54,777.88)

TIRC PROGRESS REPORT

Name of TIRC: Upper Arlington CRA V (AF BLDG)

DATE OF TIRC: 08/10/2020

Company Name: GK Knightsbridge LTD

General Agreement Terms
CRA Type: New Construction

Community Reinvestment Area: 049-0435501

No. Years: 10 2009 2018

% Value Abated: 40

Project Details/History:

Compliance History :

2018 In Compliance

2018 In Compliance

Tenants:

Camelot Dental Group

Parcel # (s):

075-000028

AGREEMENT BENCHMARKS

Real Estate Only Investment: \$ 545,000.00
Investment Completion Date: 06/30/2009
Number of Jobs Retained: 0.00
Payroll Dollars Retained: \$ 0.00
New Jobs to be Created: 17
New Yearly Payroll Created: \$ 686,000
Jobs/Payroll Created By: 06/30/2009
Building Description/Use: Office Condo
Community Involvement: Chamber of Commerce Members

Other Benchmarks:

n/a

Additional Materials Submitted: Yes

Performance Statistics:

AS VERIFIED

Real Estate Only Invested: \$ 859,500.00
Date Investment Completed: 01/01/2014
Actual Retained Jobs: Payroll 0.00
Dollars Retained: Number of \$ 0.00
New Jobs Created: 13
Payroll Dollars Created: \$ 1,243,138
Total Appraised Value: \$ 970,000.00
Total Value Abated: \$ 0.00
Annual Tax Paid: \$ 28,521.00
Foregone Tax: \$ 0.00
Delinquent Tax: \$ 0.00
Vacancies: 0

Municipalities Recommendation:

In Compliance /Continue

TIRC Recommendation: In Compliance

Further Requirements, Instructions and/or Details:

TIRC PROGRESS REPORT

Name of TIRC: Upper Arlington CRA V (AF BLDG)

DATE OF TIRC: 08/10/2020

Company Name: G&B Ventures LLC

General Agreement Terms
CRA Type: New Construction

Community Reinvestment Area:

No. Years: 10 2009 2018

% Value Abated: 40

Project Details/History:

Compliance History :

- 2019 MUST PAY DELQ TAX W/IN 30 DAYS OR ABATEMENT WILL BE DISS
- 2019 MUST PAY DELQ TAX W/IN 30 DAYS OR ABATEMENT WILL BE DISS

Tenants:

Teamwork Solutions & Einformatics

Parcel # (s):

075-000029

AGREEMENT BENCHMARKS

Real Estate Only Investment: \$ 1,090,000.00
Investment Completion Date: 06/30/2009
Number of Jobs Retained: 0.00
Payroll Dollars Retained: \$ 0.00
New Jobs to be Created: 32
New Yearly Payroll Created: \$ 1,378,050
Jobs/Payroll Created By: 06/30/2009
Building Description/Use: Office Condo - 5005 Horizons Dr
Community Involvement: Must maintain membership in The

AS VERIFIED

Real Estate Only Invested: \$ 1,175,000.00
Date Investment Completed: 01/01/2011
Actual Retained Jobs: Payroll 0.00
Dollars Retained: Number of \$ 0.00
New Jobs Created: 39
Payroll Dollars Created:
Total Appraised Value: \$ 1,500,000.00
Total Value Abated: \$ 0.00
Annual Tax Paid:
Foregone Tax:
Delinquent Tax: \$ 72,845.91
Vacancies: 0

Other Benchmarks:

Additional Materials Submitted: Yes

Municipalities Recommendation:

Performance Statistics:

TIRC Recommendation: In Compliance

Further Requirements, Instructions and/or Details:

TIRC PROGRESS REPORT

Name of TIRC: Upper Arlington CRA V (AF Bldg)

DATE OF TIRC: 08/10/2020

Company Name: 5007 Arlington Falls LLC

General Agreement Terms
CRA Type: New Construction

Community Reinvestment Area: 049-04355-01

No. Years: 10 2010 2019

% Value Abated: 40

Project Details/History:

5007 Arlington Falls LLC is a 10 year CRA (2010-2019). 40%. The building is completely occupied by UBS who as recently signed a longterm lease and renovated the building. This is the last year of the CRA.

Compliance History :

2019 In Compliance

2019 In Compliance

Tenants:

UBS

Parcel # (s):

075-000030, 31, & 32

AGREEMENT BENCHMARKS

Real Estate Only Investment: \$ 2,180,000.00

Investment Completion Date: 06/30/2009

Number of Jobs Retained: 64.00

Payroll Dollars Retained: \$ 2,750,100.00

New Jobs to be Created: 42

New Yearly Payroll Created: \$ 1,514,000

Jobs/Payroll Created By: 06/30/2009

Building Description/Use: Office Condo - 5007 Horizons Dr

Community Involvement: Mush Maintain membershi in the

Other Benchmarks:

Additional Materials Submitted: Yes

Performance Statistics:

AS VERIFIED

Real Estate Only Invested:

Date Investment Completed: 01/01/2010

Actual Retained Jobs: Payroll 63.00

Dollars Retained: Number of \$ 2,750,000.00

New Jobs Created: 0

Payroll Dollars Created: \$ 15,063,173

Total Appraised Value: \$ 3,353,000.00

Total Value Abated: \$ 1,200,100.00

Annual Tax Paid: \$ 70,580.06

Foregone Tax: \$ 21,505.39

Delinquent Tax:

Vacancies: 0

Municipalities Recommendation:

In compliance

TIRC Recommendation: In Compliance

Further Requirements, Instructions and/or Details: