REQUEST FOR PROPOSALS
Consultant for Sheridan Road SSA #54 Reconstitution

Rogers Park Business Alliance (RPBA) seeks Consultant to assist RPBA and Special Service Area staff in completing the 2021 SSA Application as required by the City of Chicago Department of Planning and Development for renewal of the existing Sheridan Road SSA #54.

Specifically, the Consultant will be responsible for the following key elements, as taken from the attached SSA Designation Steps, as well as any updates needed for the final SSA Application:

- Facilitate advisory committee meetings
- Update study area map with parcel, ward, and TIF detail as needed per the description in Attachment C
- Update the SSA database including SSA taxpayer list as needed per the description in Attachment C
- Conduct a Needs Assessment as described in Attachment C
- Establish metrics and baseline data as described in Attachment C, including, but not limited to:
    - Business profitability and enhanced property values
    - Cleanliness and maintenance
    - Safety
- Create an inventory of City and other governmental services as described in Attachment C
- Prepare a legal description of the proposed SSA boundaries as described in Attachment C
- Create an SSA District Plan as described in Attachment C
- Distribute an informational mailing and host at least 2 community meetings between March and April, 2020 as described in Attachment C
- Collect supporting signatures from at least 10% of the taxpayers of record within the boundaries of the proposed SSA and collect support signatures from some of the taxpayers of record for the largest properties in the proposed SSA for submission to the DPD by **June 12, 2020**, and an additional 10% by **August 8, 2020** (for a total of 20% of PINs in the proposed boundary).
- Complete SSA Application and Designation Packet for submission to DPD no later than **June 12, 2020**
- Attend Public Hearing at City Hall to be scheduled by DPD between August and December, 2020.

Time Frame of Contract: Consultant to begin January 2020 to ensure passage of ordinance by City Council no later than December 2020.

Proposal Requirements: Proposal should include the following;

Qualifications

- Description and history of firm
- Bios / Resumes of Consultant(s) assigned to project

- Relevant prior experience
- References

Process

- Outline activities for completion of each task
- Time table for completion of each task

Costs

- Consultant fees (explain method for calculation)
- Other Expenses (delineate each expense)

Submission and Due Date: The completed proposal is due no later than **January 22, 2020**. Please direct your questions, and send completed proposals via email, to:

Cindy Plante
Economic Development Manager
cplante@rpba.org
773-508-5885

Attachments:

A. SSA #54 Feasibility Study & Notice to Proceed
B. SSA #54 Map of Existing Boundaries
C. 2021 SSA Designation Steps For New & Renewing Special Service Areas
D. 2021 SSA Designation Timeline

DPD
CHICAGO DEPARTMENT OF PLANNING & DEVELOPMENT

2021 Feasibility Study
for New and Renewing Special Service Areas (SSAs)

City of Chicago, Department of Planning and Development
www.cityofchicago.org/DPD

INSTRUCTIONS

1. The SSA Feasibility Study for SSAs to start in calendar year 2019 is due by **November 1, 2019**.
2. Please enter information in the shaded boxes shown below.
3. Submit two hard-copies and a digital copy to the attention of your assigned DPD staff person.
4. The City will review your submission, contact you with questions or additional documents requested, and schedule an in-person interview with DPD in November.
5. The City will notify applicants of approval to proceed **by December 2, 2019.**
6. Agency financial requirements: Proof of available funds to cover SSA consulting and designation costs if SSA is not approved is due with this submission package **by November 1, 2019.** Proof of funds to begin 2021 services prior to first tax collection are due **by June 12, 2020**. Proof of funds can include bank statements documenting sufficient funds to cover these expenses, or letters of intent for loans, grants, or lines of credit. This funding cannot be secured by anticipated tax revenue.
7. For more information, contact Mark Roschen at 312-744-1083.

Proposed or existing SSA name(s): Sheridan Road SSA #54
Agency Name: DevCorp North DBA Rogers Park Business Alliance

PART 1: SPONSOR AGENCY

1. **Agency legal name on state charter, street address, website, phone:** DevCorp North (DBA Rogers Park Business Alliance) 1448 W. Morse Ave. Chicago, IL 60626. www.rpba.org. 773-508-5885.
2. **Name/title/phone/email of the Executive Director or CEO and staff assigned to work on the SSA application:** Sandi Price, Executive Director, 773-508-5885 x17, sprice@rpba.org. Cindy Plante, Economic Development Manager, 773-508-5885 x14, cplante@rpba.org.
3. **Agency mission:** Rogers Park Business Alliance cultivates and sustains a thriving economic environment in Rogers Park serving businesses and residents
4. **Briefly describe your agency's activities and assessment of how they fulfill your mission (agencies currently managing an SSA(s) include a response for the mission of your agency and the mission of the SSA(s)):** DevCorp North dba Rogers Park Business Alliance (RPBA) is a nonprofit 501(c)(3), founded in 1993, the result of a merger of three community-based organizations. The focus of the organization today is small business technical assistance and support, and community and economic development. RPBA currently administers four Special Service Areas on the north side of Chicago, Howard SSA #19, Clark/Morse/Glenwood SSA #24, Devon SSA #43 and Sheridan Road, #54. RPBA provides snow removal and maintenance services year round. The area is cleaned and maintained five days each week by a crew that also provides landscaping and beautification services and distributes important community information. Other improvements such as area marketing and promotion and public safety enhancements

are ongoing. RPBA has created commercial corridor plans for most of these districts and we are in the process of implementing those plans. The mission of the Sheridan Road SSA #54 is to sustain the competitiveness of the commercial corridor that makes up the SSA. The SSA maintains a safe, clean, aesthetically pleasing and culturally diverse environment for the benefit of business and property owners, residents and consumers. The SSA fulfills its mission by supporting several events that bring people to the district, such as dinner crawls, street festivals, music and art istallations. In addition, the Business Improvement Program provides incentive to businesses who improve the façade of their store and landscaping through a rebate. A team of workers clean the sidewalks and performs regular maintenance duties five days per week. The SSA runs promotions to encourage shopping through advertising and the Holiday Shoppers' Rebate.

5. **Briefly describe how your agency engages constituents and determines and addresses their needs:** RPBA places great emphasis on community leadership and involvement in planning processes, often working with community-based steering committees composed of residents, business owners and other stakeholders. We also have a standing monthly meeting with stakeholders from Loyola University, Edgewater Development Corporation and Edgewater Chamber of Commerce (who administers SSA #26 that is adjacent to SSA #54) to collaborate on events, promotions and community development opportunities.
6. **What are your agency's challenges, such as staff time/abilities, in effectively sponsoring and managing an SSA and how has your agency addressed those challenges?** Rogers Park Business Alliance provides numerous programs, services, events, and public art installations with a full-time staff of eight. The challenge with a small staff and big workload is to be able to do it all and do it well. RPBA overcomes its staffing challenge by hiring hard working and creative employees and leveraging interns and work study students. RPBA has a relationship with numerous internship programs, such as Chicago Semester and Kellogg School of Management and employs work study students through Loyola University Chicago. The additional help from interns and work study students allows RPBA to effectively and efficiently implement all its programs and services througout the year.
7. **What experience does your agency have that makes it a good fit to sponsor and manage the SSA(s)?** RPBA is the Sole Service Provider for four SSAs (#19, #24, #43 and #54). In addition to successfully managing SSAs for over 20 years, RPBA's Executive Director uses her 20+ years of experience in non-profit management to consult with other organizations around the City on best practices for SSAs. RPBA is a Delegate Agency of the Dept. of Housing and Economic Development and well-respected by other agencies. We have has a strong working relationship with the 49th Ward Alderwoman, Maria Hadden and the 50th Ward Alderwoman, Debra Silverstein.
8. **Agency's other contracts with the City (if any):** Other than the SSA contracts with the Department of Housing & Economic Development, RPBA has three contracts with the City's Department of Business Affairs and Consumer Protection: Generalist, Specialty Advisor and Small Business Opportunity Center.
9. **Agency's service area boundaries:** Rogers Park Business Alliance serves the Rogers Park community from Lake Michigan west to Western Ave. and from Devon north to the City of Evanston.

PART 2: SSA DISTRICT

1. **SSA district name(s), proposed general boundaries, and how and why these boundaries were identified. (Note: these boundaries must be contiguous. A map of these boundaries must**

also be submitted as an exhibit to this Feasibility Study.): The SSA district name is and will remain Sheridan Road SSA #54. The boundaries includes Sheridan Road from Devon Avenue to Farwell Avenue. The SSA has provided programs and services in the commercial district since 2012. These boundaries have proven to be agreeable and will not be changed moving forward.

2. **Briefly describe the land uses within the proposed SSA, including the vacancy rate of retail, office, and residential properties:** The SSA mainly consists of property owned by Loyola University Chicago as well as mixed-use buildings with some single use commercial buildings. Most of the land is developed. The majority of the businesses in the SSA are retail/service oriented or bars/restaurants. The vacancy rate is currently under 7%.
3. **List districts overlapping the proposed SSA(s) such as TIF, NOF, Enterprise Zone, etc:** The Devon/Sheridan TIF overlaps the SSA district.
4. **Briefly describe current or pending capital improvements or public way amenities needing maintenance in the proposed SSA(s):** There has been talk by the adjacent 48th Ward of improving the Devon/Sheridan/Broadway intersection. Talks are ongoing. Loyola University Chicago has recently stopped providing landscaping services within the district and the SSA is bidding out the project. The SSA also maintains other streetscape elements including street pole banners, bike racks, etc.
5. **List the ward(s) overlapping the SSA(s) and the aldermen's status of support for your agency as the SSA sponsor and service provider and of creating and/or reconstituting the SSA(s):** This SSA is completely within the 49th Ward. We have the full support of Alderwoman Maria Hadden.
6. **List non-profit organizations that overlap the proposed SSA boundaries, where they overlap, and confirmation they support your agency sponsoring the SSA(s):** Loyola University Chicago is the largest non-profit organization in the SSA boundaries. One of their staff serves as an SSA commissioner. There have been a few churches moving in and out of the district.
7. **Briefly describe the status so far of other local support for the SSAs(s), including the proposed taxpayers within the SSA(s):** The SSA has provided programs and services in the commercial district since 2012. These boundaries have proven to be agreeable by members of the community and will not be changed moving forward.
8. **Describe experience the property owners within the SSA have in working together and making local investments in their community:** Business and property owners within the SSA district have made strides in organizing and participating in projects created to address the district's needs.
9. **Statement of Need for the SSA(s) to include, but not limited to: the land use of district(s) being considered, the major types of property owners/tenants, quality of life concerns the SSA(s) would address, long-term development goals and how the SSA(s) would be a part of those goals, and government partnerships:** The footprint of this SSA is small. Loyola University Chicago is the largest property owner/partner within the SSA. Sheridan Road has a commercial corridor plan that is not yet complete. The SSA budget is small and we are taking implementation of the plan one step at a time. Funding is also used for marketing and branding the district, including a shopper's rebate promotion (Live Love Shop Rogers Park) starting on Small Business Saturday and ending on 12/31. The SSA will continue to run the Business Improvement Program that has been successful in providing rebates to business owners who invest in improving their store's façade and landscaping. The SSA will continue to provide maintenance services and litter pick up five days/week along with snow removal in the winter months. The SSA has created many partnerships in its 10 years of existence and plans to enter into many more. For example, the SSA past and ongoing partnerships include the Department of Human Services, the 49th Ward service office, the City of Chicago, Loyola University Chicago, Chicago Transit Authority, Edgewater Chamber of Commerce, Edgewater Development

Corporation, Sullivan High School and the Glenwood Sunday Market. The SSA has been an important organizing tool and has given the community and local businesses the opportunity to pool their resources to effect the change they want to see.

Exhibits:

1. Agency's Board List
2. Agency's Board Bylaws
3. Agency's Organizational Chart, including staff assigned to the SSA project
4. Agency's Fiscal Policies/Procedures Manual marked with the board adoption date
5. Agency's 2018 Audit
6. Agency's 2020 Cost Allocation Plan (existing SSAs only)
7. Agency's current Profit & Loss Statement and Balance Sheet
8. Map of proposed SSA boundaries
9. Proof of available funds to cover SSA consulting and designation costs if SSA is not approved. These expenses typically range from $20,000 to $60,000, depending on the size of the SSA and the scope of work provided by the consultant. **Loans and lines of credit cannot be secured by anticipated tax revenue.**

NOTES:

- Additional documents may be requested by the City at any time.
- Sponsor agency should brief the affected aldermen of your SSA application and plans.
- Aldermanic letters of support are not required, but will be accepted.
- Proof of available funds to begin 2021 services prior to first tax collection due by **June 12, 2020. Loans or lines of credit cannot be secured by anticipated tax revenue.**

SP
9/12/19

Northbrook Bank & Trust
1100 Waukegan Road
Northbrook, IL 60062

DEVCORP NORTH
DBA ROGERS PARK BUSINESS ALLIANCE
SHERIDAN ROAD # 54
1448 W MORSE
CHICAGO IL 60626-3480

6

Primary Account Number
xxxxxx0283
Statement Dates
Prior 07/31/19 Current 08/31/19
Customer Service
(847) 418-2800

FINANCIAL SUMMARY

Account Description	Account Number	Ending Balance
TRADITIONAL CHECKING	xxxxxx0283	$ 88,317.11
TOTAL DEPOSITS		$ 88,317.11

EFFECTIVE OCTOBER 1, 2019, THE FEE FOR AN INCOMING DOMESTIC WIRE WILL BE INCREASED FROM $5.00 TO $10.00.
PLEASE DON'T HESITATE TO CONTACT US WITH ANY QUESTIONS.

TRADITIONAL CHECKING

Account Number	xxxxxx0283	Beginning Balance	$ 62,254.56
Average Balance	$ 86,181.35	Deposits/Credits	$ 31,454.08
Low Balance	$ 67,339.05	Checks/Debits	$-5,391.53
		Service Charges	$-0.00
		Ending Balance	$ 88,317.11
		Enclosures	6

Daily Transaction Activity

Date	Description	Additions	Subtractions	Balance
07-31	BEGINNING BALANCE			62,254.56
08-01	#PREAUTHORIZED CREDIT	7,584.49		69,839.05
08-02	CHECK 3495		2,500.00	67,339.05
08-05	#PREAUTHORIZED CREDIT	11,451.13		78,790.18
08-06	#PREAUTHORIZED CREDIT	6,224.10		85,014.28
08-06	CHECK 3499		20.88	84,993.40
08-09	#PREAUTHORIZED CREDIT	6,194.36		91,187.76
08-09	CHECK 3500		225.00	90,962.76
08-12	CHECK 3501		212.50	90,750.26
08-23	CHECK 3502		125.00	90,625.26
08-23	CHECK 3503		2,308.15	88,317.11
08-31	ENDING TOTALS	31,454.08	5,391.53	88,317.11

DEPARTMENT OF PLANNING AND DEVELOPMENT

CITY OF CHICAGO

December 2, 2019

VIA EMAIL

Sandi Price
Executive Director
Rogers Park Business Alliance
1448 W. Morse
Chicago, IL 60626

RE: Notice to Proceed with application for 2021 SSA Term Extension

Dear Ms. Price:

The Department of Planning and Development (DPD) has reviewed your Special Service Area (SSA) Feasibility Study package submitted on November 1, 2019 for consideration as a sponsor of a term extension for SSA #54.

This letter is to inform you that DPD conditionally approves your agency to proceed as a sponsor for a 2021 SSA designation. This approval is contingent on adherence to the 2021 SSA Designation process.

The following are key next steps and items for follow-up:

1. Issue a Request for Proposal (RFP) to select a consultant. The RFP must be approved by DPD, and be posted on your agency website for at least 14 days.
2. Identify SSA Advisory Committee members and conduct a kick-off meeting with DPD staff.
3. Detailed application packages for 2021 Special Service Areas are to be submitted to DPD by **June 12, 2020, including support signatures from taxpayers of record of at least 10% of the PINs located within the proposed SSA boundaries, with a total of 20% signatures due by August 1, 2020.**
4. A complete set of Designation Steps and requirements is attached.

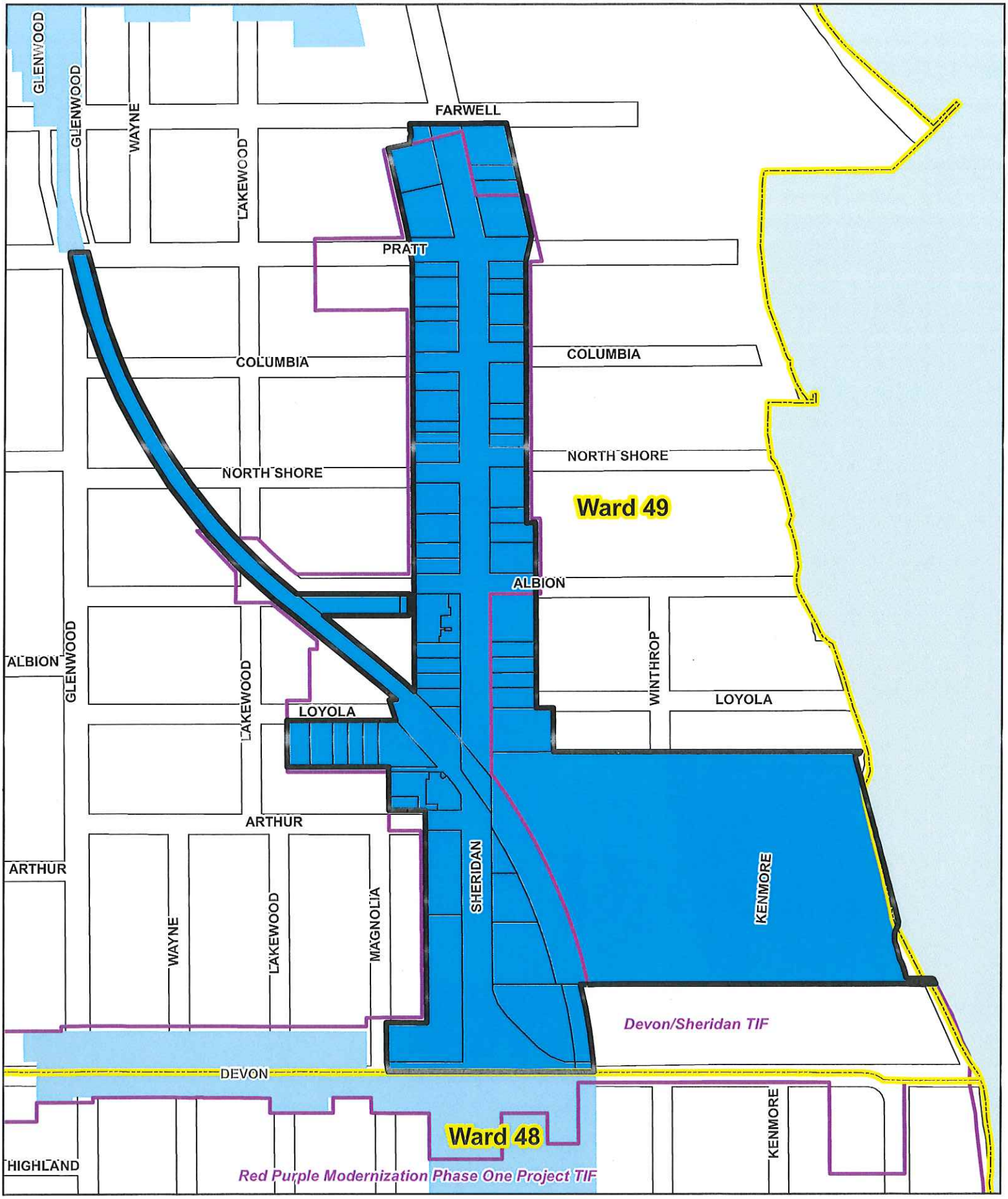
A DPD project manager will contact you to schedule the kick-off meeting. If you have any questions, you may also contact me at 312-744-1083 or mark.roschen@cityofchicago.org.

Regards,

Mark E. Roschen
Assistant Commissioner

cc: Alderwoman Maria Hadden (49th)
Chip Hastings, DPD
James Harbin, DPD
Karen Forté

attachment



Legend

- Sheridan Rd
- Other SSA
- TIF
- Wards

Sheridan Rd
SSA #54

NORTH

WORK PRODUCT
Copyright, 2011, City of Chicago

2021 Designation Steps for New and Renewing Special Service Areas (SSAs)

City of Chicago, Department of Planning and Development
www.cityofchicago.org/DPD
August 30, 2019

The following are action steps and a general timeline leading to the submission of a 2021 SSA Designation Packet. DPD staff will be assigned to your agency to guide you through the SSA designation process. Your staff contact at DPD is an ongoing source of information if you have questions or concerns.

1. **After SEPTEMBER 1, 2019: Prepare SSA Feasibility Study.** The SSA Feasibility Study is a self-assessment prepared by the Sponsoring Agency to see if an SSA is right for your area and your agency has the capacity and resources needed to sponsor and manage an SSA. The template for the Feasibility Study including required exhibits, will be emailed to applicants who contact DPD and will also be posted on the DPD website at http://www.cityofchicago.org/city/en/depts/dcd/supp_info/special_service_areassaprogram.html
   This document must be completed and submitted to DPD **by November 1, 2019**.

2. **NOVEMBER, 2019: Agency Interview.** DPD will coordinate an interview with your agency to discuss your agency and district readiness for an SSA. Agency should be prepared to discuss what aspects of the designation process they will do themselves and which they will outsource to consultants.

3. **NOVEMBER, 2019: Determine Designation Management.** The agency should prepare for sponsoring the SSA in the event they are supported by the City by determining what aspects of the designation process they will do themselves and which they will outsource to consultants. The agency is expected to conduct a Request for Proposals (RFP) process to select a qualified consultant, and will have to justify any other selection method to the City's satisfaction. The RFP announcement must be posted on the sponsoring agency's website for a minimum of 30 days prior to the submission deadline. The RFP should be drafted prior to December and be posted **by December 16, 2019**.

4. **DECEMBER, 2019: City notice regarding support to proceed.** DPD will notify the proposed sponsor agency **by December 2, 2019** of the City's approval/denial to sponsor an SSA. Applicants that are denied may continue community outreach but will not be considered for SSA establishment for 2020.

5. **DECEMBER, 2019: Form a SSA Advisory Committee.** Once your agency is confirmed as the Sponsor Agency, in partnership with the aldermen and local stakeholders, you will initiate forming the SSA Advisory Committee. Formation of the Committee must be completed **by January 8, 2020.**

- Participants on the SSA Advisory Committee shall include primarily property owners/tenants in the proposed SSA. Local residents, elected officials and community organizations may also be on the Advisory Committee. The Committee should consist of between 10 and 20 members.
- The SSA Advisory Committee shall select a chair with a history of involvement and experience in the community. The Chair will:
    i. lead the SSA Advisory Committee through the remaining steps of the SSA designation process
    ii. communicate with DPD along with the SSA Sponsor Agency
    iii. ensure the Sponsor Agency meets target dates in the SSA Project Plan
    iv. represent the committee throughout the designation process
- The committee shall meet on a regular basis to keep the SSA designation process moving forward. The committee should maintain continuity in membership while also allowing interested stakeholders to be involved in the planning process.
- **An Excel spreadsheet of the SSA Advisory Committee Members shall be created and submitted to DPD by January 8, 2020**. The list shall contain each member's name, affiliation (property owner, business name, resident, non-profit name, existing SSA Commission, etc.), mailing address, PIN in the proposed SSA, ward, phone, email, and whether the person is a current board member of the Sponsor Agency.

6. **Confirm SSA start-up funding.** The Sponsor Agency must be able to show proof that it can pay for start-up costs in the event the SSA district is not created. **The Sponsor Agency must provide proof of available funds for start-up costs as part of the Feasibility Study package.** Proof of funds can include bank statements documenting sufficient funds to cover these expenses, or letters of intent for loans, grants, or lines of credit. This funding cannot be secured by anticipated tax revenue. **Loans or lines of credit cannot be secured by anticipated tax revenue. The Sponsoring Agency is responsible to pay for the expenses incurred during the application process in 2020, if the SSA is not created.** Start-up costs include, but are not limited to: a legal description, PIN database, mapping, public hearing notices, filing fees, and consultants as needed to provide these and other technical services. Costs vary, however it is reasonable to plan for costs ranging from **$20,000 - $60,000**. SSA start-up costs are reimbursable in the 2021 SSA budget, if the SSA is created.

7. **JANUARY - MARCH 2020: Note: The following documents are often facilitated and prepared by a consultant and should be included in the RFP for consultant**

    SSA Funding, Visioning and Boundaries

    a. **Project Plan.** The SSA Advisory Committee, in partnership with the Sponsor Agency, shall draft a project plan that sets target dates for the completion of action items needed to complete the application process **by June 12, 2020.** The project plan should be revised as needed to keep on schedule.

    b. **Vision Statement**. The SSA Advisory Committee shall prepare a Vision Statement for the SSA which will answer questions such as: What kind of place

do they want the SSA to be? Which goals are most widely held for the SSA? Why did they join the committee? The Sponsor Agency will help the committee prepare a Vision Statement to be available to the public.

c. **Refine Boundaries.** Although the boundaries may change through the designation process, a reasonably final boundary should be defined in order to estimate services and costs. Properties in the boundary must be contiguous.

d. **Prepare a Map.** The Sponsor Agency should prepare a study area map using the tax parcels as the base, parcel color-coding showing the County Class codes, wards, TIFs, adjacent SSAs, and any other relevant overlays to give context. The Sponsor Agency will submit the boundaries and map to DPD who will use this map and the subsequent legal description to prepare the final official map.

e. **Prepare a PIN Database.** The PIN database is one of the most important research tools of the SSA designation. The database will include information on properties within the proposed SSA boundaries and will allow you to contact taxpayers and do tax analysis. See the Appendix for components of the PIN database. Update EAV when actual 2019 EAVs are released in **June, 2020**. For more information see Appendix on Page 8.

f. **Conduct a Needs Assessment.** A Needs Assessment will help prioritize services and programs the SSA stakeholders want and are willing to pay for. The Needs Assessment Survey can be prepared via an online survey program and distributed via email and posted on the agency's website. The Sponsor Agency shall make every effort to conduct in-person surveys with taxpayers, tenants, residents and shoppers to get a "district user" perspective.

g. **Establish metrics and baseline data.** In coordination with the City and SSA Advisory Committee, the Sponsor Agency will determine on what basis (e.g. what metrics) the SSA's impact will be evaluated. Metrics shall include, but are not limited to:

Business profitability and enhanced property values

- Number of new and renewing business licenses in the district
- Assessed values of business improvement district properties
- Property tax valuation of district properties
- Rates of vacancy and occupancy
- Overall retail performance

Cleanliness and maintenance

- Garbage removal, in total bags and tonnage of garbage
- Square footage of new plantings and replacement plantings
- Number of incidents of graffiti removal
- Number of maintenance calls to 311

Safety

- Number of crimes reported
- Number of vacant lots and abandoned buildings

h. The Sponsor Agency in coordination with the SSA Advisory Committee and City shall determine what baseline data is needed to track the SSA's impact. The Sponsor Agency may conduct studies in advance of creating or reconstituting the SSA district, such as market studies, economic impact studies, land use inventories, etc.

i. City and Other Governmental Services Inventory. The Sponsor Agency shall work with government agencies to create an inventory of current and proposed services in the district as well as gain an understanding of how to work with the respective governmental entity on service delivery. The purpose of this step is to avoid service duplication/gaps and ensure compliance/coordination with procedures. Inventories may include such things as: maintenance programming with Dept. of Streets and Sanitation, streetscape elements with Dept. of Transportation, and security programs with the Chicago Police Department.

j. Prepare a draft legal description. The Sponsor Agency shall retain a surveyor to prepare a meets-and-bounds legal description for the SSA. This document shall be submitted in MS Word format. DPD GIS staff will use the draft legal to prepare the draft map. DPD will also confirm the legal description with the Cook County Clerk's office.

k. Draft the SSA District Plan. The District Plan is the most important deliverable in the SSA planning process because it is the "business plan" for the SSA. It outlines such aspects as the services, budget, tax rate, governance, operations, results, and assessment. Once complete, the SSA District Plan shall answer all reasonable questions about the intentions and provide a road map of the SSA. See the Appendix page 9 for specifics on preparing the SSA District Plan.

8. MARCH - APRIL, 2020: SSA Outreach, Support, Refinement and Submission

a. Distribute an informational mailing and host community meetings. Once the SSA District Plan is drafted, the SSA Advisory Committee along with the Sponsor Agency, DPD, and the aldermen **must hold at minimum two community meetings**. These meetings will educate stakeholders about the SSA, allow for feedback and gauge support for the SSA.

i. The **informational mailing** should include notice of both meetings, information about SSAs, and information about the proposed or reconstituting SSA. The mailing should be sent by first class mail to property owners and stakeholders 10 days in advance of the meeting.
ii. The Sponsor Agency and SSA Advisory Committee should also **encourage stakeholders to attend via personal contact, email and other methods to encourage attendance**.
iii. The Sponsor Agency and SSA Advisory Committee will work with DPD to prepare the community meeting presentation. The presentation will be kicked-off by the local aldermen followed by DPD introduction to SSAs. The Sponsor Agency with the SSA Advisory Committee and consultant then present on the specific SSA. Questions are fielded by any of the

presenters. **The Sponsor Agency will take notes from both meetings and post them on their website in a timely manner**.

b. **Distribute a second informational mailing as needed and host additional community meetings as needed.** A second mailing and additional community meetings may be necessary based on feedback from the first two community meetings and other factors. The Sponsor Agency shall host additional meetings as needed for the community and/or specific stakeholders.

c. **Support.** The Sponsor Agency and SSA Advisory Committee shall prove that there is support from the community the SSA is seeking to serve. **SPECIFICALLY, THEY ARE REQUIRED TO COLLECT SUPPORT SIGNATURES OF THE TAXPAYERS OF RECORD FROM AT LEAST 20% OF THE PINs WITHIN THE BOUNDARIES OF THE PROPOSED SSA and submitted to DPD as follows:** support signatures from a minimum of 10% of the PINs are due with the application on **June 12, 2020**. The balance of support signatures totaling a minimum of 20% of the PINs must be submitted to DPD **by August 3, 2020**. If during DPD's review there are questions regarding the authenticity of signatures, the SSA provider MUST provide additional information to prove that the signer is the owner or taxpayer of record or an authorized representative of the property associated with a given PIN. DPD will provide an affidavit for the applicant to complete attesting to the accuracy of the signatures, and an affidavit for the consultant to complete attesting to the accuracy of the PIN list at the time it was obtained. These affidavits must be submitted to DPD when the 20% requirement has been attained.

d. **Identify the SSA Commissioners.** With focus and clarity on the SSA, the Sponsor Agency, in coordination with the aldermen and SSA Advisory Committee, shall help recruit the first slate of SSA Commissioners and collect their applications.
    i. SSA Commissioners are mayorally-appointed public officials so qualifications and recruitment/renewal procedures should factor in both City and local criteria.
    ii. To avoid the appearance of or actual conflicts of interest, Commissioners are prohibited from also being an active board member of the Service Provider Agency.
    iii. The Sponsor Agency and DPD shall coordinate with candidates to complete the City's SSA Commissioner application.
    iv. Include with the commissioner applications a summary list of candidates with their SSA address, ward, property owner or tenant status, and status on the Service Provider Agency's board.

9. **JUNE 14, 2019: SSA Application Due and SSA Designation Packet Due.** Provide two hard-copy binders. The binders must be organized so that each section of the application is identified by tabs. **Existing service providers** shall also upload a digital copy of the application package to **SharePoint**. **New applicants** shall submit a digital copy on a **flash drive** to the attention of your assigned DPD staff person. The City will review the SSA Packet and contact you with questions. The following items must be included in the SSA Packet:

a. **SSA District Plan**
b. **SSA Application** (2-page document) signed by a property owner with proof of ownership
c. Original SSA **Commissioner Applications**
d. **Financing Commitment:** If the Sponsor Agency is being considered as the SSA Service Provider, the Agency shall provide proof of financing commitment to finance Year 1 of the SSA, if providing services in advance of the tax distribution is desired (final confirmation is due upon submission of the SSA application **by June 12, 2020.** The Agency should provide a letter of intent from its lender. This financing CANNOT be secured by anticipated tax collections.

10. **JUNE - JULY 2020: Make final corrections to the SSA Packet.** With support from relevant City agencies, DPD will work with the Sponsor Agency to finalize documents for the SSA ordinance, especially the legal description, PIN list and map. An SSA application, inclusive of any updates or changes to the initial application, must be on file with the DPD. **The City has the final authority to accept or reject the application.**

11. **AUG - DEC 2020 Legislative steps.**

    a. **Legislation.** DPD will commence the required legislative authorization. Legislative steps include a public hearing, and an ordinance authorizing the SSA term, annual work plan/budget, service provider ordinance, and the SSA Commissioner confirmations. DPD will provide an Ordinance Checklist to the agency to prepare documentation needed for the Service Provider Agreement ordinance.
    b. **Public Hearing Notice:** The Committee on Finance will designate when a public hearing will be held. The sponsoring agency shall be responsible for paying for the cost of a public notice in a newspaper of general circulation at least 15 days prior to the date of the public hearing. The notice will be prepared and placed by the City. The sponsoring agency shall also be responsible for notifying all tax payers of record for each PIN located within the boundaries of the proposed SSA. DPD will provide envelopes, but all other costs of copying, assembling, and mailing the notices, **including postage**, will be the responsibility of the sponsoring agency. The notice must be sent by First Class mail and a certification of mailing shall be provided to DPD. The notices must be **postmarked a minimum of 10 days prior to the date of the public hearing.**
    c. **Financing.** Should it be desired to start services prior to the first tax distribution, the Service Provider Agency must have a line of credit or clearly designated funding source in place **by June 12, 2020.** We recommend that services start prior to the first tax distribution, if possible. Please note, if the funding source is a line of credit, it must be secured under the name of the Sponsoring Agency on its own creditworthiness and **cannot be secured by anticipated tax collections**.

12. **DEC 2020 – FEB 2021: Governance and Operations Set-up**

    a. **SSA Commissioner Bylaws.** The City will provide the SSA Commission with the SSA Commission bylaws template so they can customize and adopt their bylaws.
    b. **SSA Commissioner Training.** The City will coordinate a SSA Commissioner training, which will include training on the City's Governmental Ethics Ordinance, the IL Open Meetings Act, Robert's Rules of Order, and overall best practices for governance.
    c. **SSA Policies.** The SSA Commission shall establish policies to guide the SSA Service Provider's operations. Policies may include such areas as: communications, fiscal, vendor selection, etc.
    d. **Set up SSA Operations.** In coordination with SSA policies, the Service Provider Agency shall refine and implement its SSA Operations Plan. Operations procedures shall include, but not be limited to: how the agency will manage the SSA, job descriptions for people assigned to the SSA, financial procedures, communication procedures, request for proposals ("RFPs") for key SSA services, assessment methods, etc.
    e. **SSA Service Provider Agency Training.** While agencies come prepared with the skills to manage a SSA, the City will provide ongoing training and best practices support for SSA Provider Agencies. Support will include a best practices library, a digital forum, gatherings of SSA agencies, and topical guest speakers/webinars.

13. **FEBRUARY – APRIL 2021: SSA Tax Levy Distribution (Renewing SSAs):** The first SSA tax levy (2020 taxes due in 2021) will be due and anticipated to be paid on the first installment tax bill. The City will distribute SSA funds via Automated Clearing House (ACH) to the Service Provider Agency or what ever the method is at the time of distribution.

14. **AUGUST - OCTOBER 2021: First SSA Tax Levy Distribution (New SSAs):** The first SSA tax levy (2020 taxes due in 2021) will be due and anticipated to be paid on the second installment tax bill. The City will distribute SSA funds via Automated Clearing House (ACH) to the Service Provider Agency or what ever the method is at the time of distribution. The full year of taxes is collected in the second installment.

APPENDIX

SSA Database

Prepare the SSA Database in one Excel workbook to include, but not be limited to:

1. Worksheet describing the data collection/analysis method
2. Worksheet of summary data
    a. Confirmation that 2018 or 2019 board certified data is being used (NOTE: Accommodation will be made for updating data depending on timing of when 2019 board certified data is available)
    b. Total number of PINs and of these:
        1. Total taxable PINs
        2. Total non-taxable PINs
    c. Total EAV used to calculate the tax bills and of this:
        1. Total EAV captured in the Base EAV by each TIF (if applicable)
        2. Total EAV captured in the TIF Increment by each TIF (if applicable)
        3. EAV not captured in TIF(s)
    d. Delinquent PINs
    e. Any other relevant data
3. Worksheet(s) of the Cook County Land Use List and Pie Chart: list each county land use in the SSA, each land use's dollar amount and percent of the total Tax Year 2019 (payable in 2020) levy and maximum levy. Create a pie chart for the Tax Year 2019 (payable in 2020) and maximum levies showing the $ and % of totals. Include a legend explaining what the county classification types mean.
4. Worksheet(s) with the following data columns for each PIN with totals at the top as relevant:
    a. 14-digit PIN
    b. property address in the SSA
    c. Name and mailing address of the taxpayer who paid taxes for the last preceding year. If the taxes were <u>not</u> paid, note this and list the name and mailing address of the property owner (not taxpayer, but property owner)
    d. Board certified 2017 or 2018 EAV used to calculate the tax bill
    e. Board certified 2017 or 2018 EAV captured in the Base EAV for the respective TIF (if applicable)
    f. Board certified 2017 or 2018 EAV captured in the TIF Increment by each TIF (if applicable)
    g. Board certified 2018 or 2019 EAV not captured in TIF
    h. Non-taxable PINs
    i. Columns showing the SSA levy ($ amount) generated from multiplying the EAV in items 4.d. – 4.g. above with:
        1. the proposed maximum tax rate cap - the column header should state the tax rate cap % and % increase in tax bills this tax represents
        2. the proposed tax rate for 2020 levy payable in 2021 - the column header should state the tax rate cap % and % increase in tax bills this tax represents

3. for existing SSAs: the tax rate for 2020 payable in 2021 - the column header should state the tax rate cap % and % increase in tax bills this tax represents

j. Columns to track the positions of taxpayers (support or oppose)
k. Cook County class code (land use)
l. Other data columns as relevant

SSA District Plan

The SSA District Plan should be a one PDF file and include, but not be limited to, the following:

1. **SSA District Plan Executive Summary.** This shall serve as a "one-pager" on the SSA and include a brief overview including, but not limited to:
    a. **Why the SSA?** Provide a summary as to why the new or reconstituted SSA is being proposed. Include the SSA Vision Statement.
    b. **SSA Contacts.** List the Sponsor Agency and SSA Advisory Committee contact information.
    c. **SSA Stats.** Included but not limited to: SSA number/name, general boundary, ward(s), community area, tax rate cap, year 1 tax rate, year 1 funding, typical year funding and tax rate, total 2018 or 2019 EAV used to calculate tax bills (if in TIF(s) itemize the portion of total EAV in each TIF base, each TIF increment, and EAV not in TIF as applicable), proposed term, and other stats that would help the reader quickly understand the SSA.
    d. **History and Track Record.** For new and existing SSAs, provide a brief overview of the Sponsor Agency's accomplishments that highlight how your agency is supporting the district. For existing SSAs, include a history and track record of the SSA including how you've spent funds as the SSA Service Provider. Provide an overview of key fiscal management measures the Service Provider Agency and Commission have (or will have) in place.

2. **Improvement and Activity Plan.**
    a. **SSA Stakeholders.** Provide a list and description of participants in the SSA planning process including the Sponsor Agency, SSA Advisory Committee, aldermen, and other government and community partners.
    b. **Project Plan.** Use the project plan to provide a timeline of activity to date for the SSA designation. Include a more detailed timeline as an exhibit.
    c. **Needs Assessment Survey Summary.** Provide an overview of the survey process and results.
    d. **Plan approval.** Note the local review/approval of the SSA District Plan, including progress to date on meeting the City's support thresholds.
    e. **SSA Boundaries.** List the boundaries and attach a map. Provide an overview explaining how the boundaries were determined. For existing SSAs, explain any recommended changes to the boundaries.
    f. **Determine services/improvements.** Review the work done so far on services and the results from the Needs Assessment Survey to prepare a list of service categories and the specific work scopes within each for the first year and through the next five years. Provide a narrative of the services for the first operating year and when applicable, include recommendations services in subsequent years. Include an overview of the Service Provider direct services

and administrative services for the SSA. The services/ improvements will be used to prepare the 2020 Work Plan using DPD's template.

g. **Determine first-year and 5-year budgets.** SSA budgets are service-driven and based on the services research, rather than based on what the maximum levy could be and then determining how to spend the funds. Costs can be determined through vendor estimates and comparisons to comparable SSAs. Provide an overview of the first year 2021 budget and projections for 2022-2025. The budget information will be used to prepare the 2021 Budget using DPD's template. Include a summary 2021 and 2022-2025 budget chart.

h. **Determine the tax rate cap and typical tax rate.** SSA tax levy money is generated by multiplying a tax rate by each property's Equalized Assessed Value ("EAV"). Properties with a larger EAV pay more than those that are smaller and should also receive proportionately more benefit. The tax rate cap should be high enough to allow for fluctuations in levy needs while also capping the amount the SSA could levy. Provide an easy-to-understand description of the tax method, including the difference between the tax rate and the percent increase in taxes from the SSA, TIF increment, the budget process, and time/manner of collecting levy.

3. **Governance, Management and Assessment**
   a. **SSA Commission.** Provide an overview of the commissioner qualifications and selection/renewal process and include the full version as an exhibit. Note the commission is a public body subject to the IL Open Meetings Act.
   b. **Service Provider Agency.** Describe how the agency plans to (or does) manage the SSA, including oversight of subcontractors. Include the SSA operations plan as an exhibit.
   c. **Baseline Data and Program Assessment.** Provide an overview of baseline data and metrics that will be tracked over time to correlate the impact of SSA services in the district. Explain how the Commission and Service Provider Agency will assess how SSA activities are doing in fulfilling the goals of the SSA. Include recommended methods for assessment (surveys, data sets, field checks, etc.) ways to report results (annual report, annual meetings, website, social media, etc). Provide detail as relevant as an exhibit.
   d. **Communications.** Provide an overview of how the SSA Commission and Service Provider Agency plan (or do if an existing SSA) communicate about SSA matters and make themselves accessible for questions and input from the public.

4. **Exhibits.** Exhibits shall include, but not be limited to:
   a. SSA Feasibility
   b. List of the SSA Advisory Committee and Sponsor Agency Board and Staff assigned to the designation and management of the SSA
   c. SSA Designation Timeline
   d. SSA taxpayer list (highlights from the SSA Database and note which ones have letters of support on file)
   e. Map with parcel, ward, and TIF detail
   f. Copies of materials sent out in informational mailings
   g. Minutes of SSA Advisory Committee Meetings and Community Meetings
   h. Copies of media articles written about the SSA designation effort

i. List of the first slate of SSA Commissioners and the SSA Commissioner Qualifications and Recruitment/Renewal Procedures

j. SSA Operations Plan (shall include, but not be limited to: management plan, job descriptions, financial procedures, narrative of cost allocation planning, communication procedures, request for proposals for key SSA services, assessment methods, etc.)

Note: Sponsor Agency should brief local aldermen on their SSA application package. Aldermanic letters of support are not required, but will be accepted.

2021 Designation Timeline
for New and Renewing Special Service Areas (SSAs)

City of Chicago, Department of Planning and Development
www.cityofchicago.org/DPD

Due Date	Action
8/30/19	DPD releases 2021 application documents
11/1/19	Applicant submits Feasibility Study with exhibits to DPD
November	DPD reviews feasibility studies and meets with applicants
12/2/19	DPD notifies applicants of approval or denial to proceed
12/16/19	Applicant issues RFP for consultant
1/8/20	Applicant forms SSA Advisory Committee and provides list of Committee members to DPD
1/22/20	Consultants submit proposals to Applicant
1/29/20	SSA Advisory Committee meets to select Consultant
2/3/20	Applicant notifies DPD of consultant selected
February	Consultant begins meeting with SSA Advisory Committee to collectively formulate a plan to collect data for required application documents to be submitted to DPD **by 6/12/20**
March-April	Applicant conducts **2 community meetings** to present proposed scope of services and 2021 budget to SSA stakeholders and begins collecting support signatures from taxpayers of record of at least 20% of the PINs within the proposed SSA boundaries as required by DPD
6/12/20	**SSA Application Due and SSA Designation Packet Due.** Provide two sets of hard-copies contained in three-ring binders, organized so that each section of the application is identified by tabs. Existing Service Providers shall also upload a digital copy of the application package to SharePoint. New applicants shall submit a digital copy on a flash drive to the attention of your assigned DPD staff person. **The application must include support signatures from taxpayers of record of at least 10% of the proposed PINs. DPD will not review applications if this initial signature requirement is not attained.**
June, July	DPD reviews application and may require the applicant to make corrections or provide additional information
8/3/20	Applicant must submit remainder of support signatures from taxpayers of record of at least 20% of the proposed PINs. **DPD will not proceed if this requirement is not attained.**
August	DPD approves application and prepares a public hearing ordinance package
October	Public hearing conducted at City Hall. Applicant must attend and provide testimony.
November	SSA ordinance introduced to City Council
December	SSA ordinance tentatively approved by City Council and filed with Cook County Clerk and Recorder of Deeds
1/1/21	Service Provider can begin services if upfront funding has been arranged
January	SSA Commission meets to discuss and approve bylaws
March	SSA taxes collected and distributed to service providers of **existing** SSAs
August	SSA taxes collected and distributed to service providers of **new** SSAs