

REQUEST FOR PROPOSALS

Consultant for Clark/Morse/Glenwood SSA #24

Reconstitution



Rogers Park Business Alliance (RPBA) seeks a Consultant to assist RPBA and Special Service Area staff in completing the 2023 SSA Application as required by the City of Chicago Department of Planning and Development for renewal and expansion of the existing Clark/Morse/Glenwood SSA #24.

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
- Prepare expanded study area map with parcel and ward detail as described in Attachment C, using the proposed map included in the approved feasibility study. (There is an expiring TIF in this area).
- Prepare an expanded SSA database including SSA taxpayer list as described in Attachment C, based on the proposed boundaries included in the approved feasibility study.
- 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, 2022 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 **Friday, June 10, 2022**, and an additional 10% by **Monday, August 1, 2022** (for a total of 20% of PINs in the proposed boundary).
- Complete SSA Application and Designation Packet for submission to DPD no later than **Friday, June 10, 2022**
- Attend Public Hearing at City Hall to be scheduled by DPD between August and December, 2022.

Time Frame of Contract: Consultant to begin Monday, January 31, 2022 to ensure passage of ordinance by City Council no later than October 2022.

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 21, 2022**. Please direct your questions, and send completed proposals via email, to:

Carolina Juarez
Business District Manager
cjuarez@rpba.org
773-508-5885

Attachments:

- SSA #24 Feasibility Study & Notice to Proceed
- SSA #24 Map of Existing Boundaries
- 2023 SSA Designation Steps For New & Renewing Special Service Areas
- 2023 SSA Designation Timeline



2023 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 2021 is due by **November 1, 2021.**
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 1, 2021.**
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, 2021.** Proof of funds to begin 2021 services prior to first tax collection are due by **June 10, 2022.** 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): Clark/Morse/Glenwood SSA #24

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 x7, sprice@rpba.org. Carolina Juarez, Business District Manager, 773-508-5885 x4, cjuarez@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 Street (Jarvis Square) SSA #19, Clark/Morse/Glenwood SSA #24, Devon Avenue SSA #43 and Sheridan Road, #54. RPBA provides maintenance services year-round. The areas are cleaned and maintained five days each week by a crew that also provides landscaping and beautification services and distributes important community information. Other initiatives 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 Vision Clark Street

Commercial Corridor plan was created in 2017. In 2018, we began implementing the plan recommendations. Many improvements have been completed and there are some that are still in process, including using 3.8M of TIF funds for long needed renovations to the Clark and Devon intersection. The mission of the Howard Street SSA #19 is to sustain the competitiveness of the commercial corridors that make 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 art installations including our Mile of Murals program along the Redline CTA tracks, a farmers market (The Glenwood Sunday Market), dinner crawls and street festivals, including a Taco Crawl. In addition, the Business Improvement Program provides an incentive to businesses who improve the façade of their store through a rebate. The SSA runs promotions to encourage shopping through advertising and a Holiday Shoppers' Rebate program that begins on Small Business Saturday and runs through December 31st each year.

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 have regular engagement with local businesses and have a seat on the 24th CAPS District Advisory Council (DAC). We also meet regularly with our local beat facilitator and visit local businesses together. We meet monthly with the 49th Ward economic development manager to stay focused and involved. All of our meetings are open to the public and we encourage participation.
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 in addition to SSA management with a full-time staff of nine. 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 providing an excellent work environment both in person and virtually, hiring hard working and creative employees and leveraging interns, work study students and consultants. RPBA has an excellent 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 throughout 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 25+ 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 Business Affairs and Consumer Protection and is well-respected by other agencies. We have a strong working relationship with the 40th Ward Alder, Andre Vasquez; 49th Ward Alder, Maria Hadden; and the 50th Ward Alder, Debra Silverstein. We also interact regularly with several Cook County commissioners, our State Representative Kelly Cassidy and our State Senator Mike Simmons.
8. **Agency's other contracts with the City (if any):** In addition to the SSA contracts with the Department of Housing & Economic Development, RPBA has four contracts with the City's Department of Business Affairs and Consumer Protection: Generalist, Business Stage Specialist, Cultural Specialist and Capital Specialist.
9. **Agency's service area boundaries:** Rogers Park Business Alliance serves the Rogers Park community from Lake Michigan west to Ridge Ave. and from Devon north to the City of Evanston. We also serve the businesses within SSA #43, which borders our service area.

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 for the past 20 years has been Clark/Morse/Glenwood SSA #24. We would like that name to continue. The proposed boundaries are Clark Street: Birchwood to Devon on the west side of the street and Birchwood to Arthur on the east side of the street. Morse Avenue: Sheridan to Clark. Glenwood Avenue: Greenleaf to Pratt; Greenleaf: Ravenswood to Clark; Lunt: Ravenswood to Clark. The current SSA #24 boundaries on Clark Street are from Birchwood to Albion. RPBA has been approached by business owners such as Eric Kugelman from Leather64Ten and Mike Sullivan, the property owner of 6410 N. Clark where Eric's business is located about extending the SSA boundary south to Devon Ave. which would bring the building and business within the SSA boundaries. The natural gateway to Rogers Park is Devon Avenue and we are working with CDOT for intersection improvements that would include closing Arthur Avenue to traffic. We are proposing this expansion to better serve these constituents and to be able to maintain the streetscape elements proposed for Arthur Avenue. We will not be deleting any PINs from the current SSA boundaries.
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 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 around 15%.
3. **List districts overlapping the proposed SSA(s) such as TIF, NOF, Enterprise Zone, etc.:** Devon/Sheridan TIF and Clark/Ridge TIF.
4. **Briefly describe current or pending capital improvements or public way amenities needing maintenance in the proposed SSA(s):** Rogers Park Business Alliance signed a Maintenance Provider Agreement for the Morse Avenue Streetscape. The SSA is responsible for maintaining the streetscape elements and plantings.
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):** 49th Ward, Alder Maria Hadden is the Alder of the current SSA. Our expansion would include the 40th Ward. We have the full support of Alder Andre Vasquez for the expansion of the southern boundary of the SSA.
6. **List non-profit organizations that overlap the proposed SSA boundaries, where they overlap, and confirmation they support your agency sponsoring the SSA(s):** Northside Community Resources located on 1530 W. Morse is a social service agency with housing, senior citizen, multicultural resource, and victim advocacy programs. Rogers Park Business Alliance has worked closely with NCR and NCR is in full support of the economic development work RPBA does. Howard Brown and Gerber Hart Library are in the expansion area. We have collaborated with them in the recent past.
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 2003. The taxpayers within the district have supported this initiative several times already and we don't anticipate any opposition. We understand that the owners of the Clark/Devon Hardware store are not in favor of being included in the SSA boundaries and have therefore excluded their corner of Clark and Devon on the west edge of the proposed expansion area.
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. In 2017, there was a large community process to create the Vision Clark Street master plan. Since the plan was created, we have been implementing the initiatives identified with input from community stakeholders, some under the direction of CDOT.

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:** Clark/Morse/Glenwood SSA #24 consists of two main districts. Clark Street, the primarily Hispanic commercial corridor, and Morse/Glenwood which has been branded the Glenwood Avenue Arts District. Clark Street merchants have made strides in organizing and identifying the district's needs. The district now has a commercial corridor plan that has created a blueprint for capital investment and soft costs such as coordinated marketing. We have created a branding campaign "The Flavors of Clark Street". The SSA will provide the funding and support to continue to implement the initiatives of the commercial corridor plan. Businesses in the Glenwood Avenue Arts District will continue to draw support from the SSA for the annual Glenwood Avenue Arts Fest, Glenwood Sunday Market, Mile of Murals art project and other community events. In both districts, 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. The SSA will provide maintenance services and litter pick up through our maintenance program, five days/week along. The SSA has created many partnerships in its 20 years of existence and plans to enter into many more. For example, the SSA partners with the Chicago Department of Transportation, Department of Human Services, the 40th and 49th Ward Alders offices, the City of Chicago Department of Business Affairs and Consumer Protection, Howard Area Community Center, Chicago Transit Authority, Union Pacific, Trilogy, 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.

SSA 24 Notice to Proceed

3 messages

Mark Roschen <Mark.Roschen@cityofchicago.org>

Thu, Dec 2, 2021 at 4:45 PM

To: "sprice@rpba.org" <sprice@rpba.org>, Karen Forte <Karen.Forte@cityofchicago.org>

Cc: "cjuarez@rpba.org" <cjuarez@rpba.org>, Mary O'Connor <Mary.O'Connor@cityofchicago.org>

Sandi,

DPD has reviewed the application documents you submitted on 10/21/2021 and is hereby issuing a **Notice to Proceed** with the formal SSA application process to extend the term of SSA #24 Clark Morse Glenwood. This conditional approval is contingent on completing the items and steps in the attached Designation Steps and Timeline documents. The first steps are to assemble an advisory committee to select a consultant to help guide you through this process. The formal application must be submitted to DPD **by June 10, 2022**.

Congratulations, and please let us know if you have any questions along the way.

Mark Roschen

Assistant Commissioner - SSA Program

Small Business Advocacy Division

312.744.1083

mark.roschen@cityofchicago.org**Department of Planning and Development**

121 N. LaSalle, Room 1003 Chicago, IL 60602

From: Sandi Price <sprice@rpba.org>**Sent:** Thursday, October 21, 2021 11:07 AM**To:** Karen Forte <Karen.Forte@cityofchicago.org>; Mark Roschen <Mark.Roschen@cityofchicago.org>**Cc:** cjuarez@rpba.org <cjuarez@rpba.org>**Subject:** 2023 Feasibility Study for SSA #24

[Warning: External email]

Hi Karen and Mark:

Attached is the required documentation for the 2023 Feasibility Study for renewing Clark/Morse/Glenwood SSA #24. We are looking to expand the boundaries on Clark Street south to Devon on the west side of the street and south to Arthur on the east side of the street. Two copies of this Feasibility Study are being mailed to you.

Let me know if you have any questions or need any additional information.

Sandi Price

Executive Director

a:

[1448 W. Morse Ave.](#)





2023 Designation Steps for New and Renewing Special Service Areas (SSAs)



City of Chicago, Department of Planning and Development
www.cityofchicago.org/DPD
September 1, 2021

The following are action steps and a general timeline leading to the submission of a 2023 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. SEPTEMBER 1, 2021: 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, 2021.**
- 2. NOVEMBER, 2021: Agency Interview.** For new applicants, 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, 2021: 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 posted **by December 16, 2021.**
- 4. DECEMBER, 2021: City notice regarding support to proceed.** DPD will notify the proposed sponsor agency **by December 1, 2021** 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 2023.
- 5. DECEMBER, 2021: 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 7, 2022.**

- 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. ensure the Sponsor Agency meets target dates in the SSA Project Plan
 - iii. 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 7, 2022.** 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 2022, 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 2023 SSA budget, if the SSA is created.
7. **JANUARY - MARCH 2022: 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 10, 2021**. 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. The consultant should update the PIN data spreadsheet when actual 2021 EAVs are released in **June, 2022**. 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. Examples of metrics that can be used include:
 - 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, 2022: 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 must be sent by first class mail to property owners and stakeholders at least 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 10, 2022**. The balance of support signatures totaling a minimum of 20% of the PINs must be submitted to DPD **by August 1, 2022**. 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 mayoral-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 10, 2022: SSA Application Package Due. SSA Application Package Due.** Provide an electronic copy (thumb drive) of the SSA application documents, organized so that each section of the application is saved in folders and PDF files. **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. Once the signatures are confirmed, DPD will review the SSA Packet and contact you with questions.

10. 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** must be mailed or dropped off to DPD.
- 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 10, 2022**. The Agency should provide a letter of intent from its lender. This financing CANNOT be secured by anticipated tax collections.

11. JUNE - JULY 2022: 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.**

12. AUG - DEC 2022 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 a checklist to the agency to prepare documentation needed for the Service Provider Agreement ordinance.
- b. **Public Hearing Notice:** The City Council Committee on Economic, Capital and Technology Development 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 taxpayers 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 identified **by June 10, 2022**. 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.

13. DEC 2022 – FEB 2023: 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.

14. FEBRUARY – APRIL 2023: SSA Tax Levy Distribution (Renewing SSAs): The first SSA tax levy (2022 taxes due in 2023) 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.

15. AUGUST - OCTOBER 2023: First SSA Tax Levy Distribution (New SSAs): The first SSA tax levy (2022 taxes due in 2023) 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 2021 board certified data is being used (NOTE: Accommodation will be made for updating data depending on timing of when 2022 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 2021 (payable in 2022) levy and maximum levy. Create a pie chart for the Tax Year 2021 (payable in 2022) 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 not paid, note this and list the name and mailing address of the property owner (not taxpayer, but property owner)
 - d. Board certified 2020 or 2021 EAV used to calculate the tax bill
 - e. Board certified 2020 or 2021 EAV captured in the Base EAV for the respective TIF (if applicable)
 - f. Board certified 2020 or 2021 EAV captured in the TIF Increment by each TIF (if applicable)
 - g. Board certified 2020 or 2021 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 2022 levy payable in 2023 - 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 2021 payable in 2022 - 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 2020 or 2021 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 2023 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 2023 budget and projections for 2024-2027. The budget information will be used to prepare the 2023 Budget using DPD's template. Include a summary 2023 and 2024-2027 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 proposed SSA Commission and Service Provider plan to 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.

2023 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
9/1/21	DPD releases 2023 application documents
11/1/21	Applicant submits Feasibility Study with exhibits to DPD
November	DPD reviews feasibility studies and meets with new applicants
12/1/21	DPD notifies applicants of approval or denial to proceed
12/16/21	Applicant issues RFP for consultant
1/7/22	Applicant forms SSA Advisory Committee and provides list of Committee members to DPD
1/21/22	Consultants submit proposals to Applicant
By 1/28/22	SSA Advisory Committee meets to select Consultant
2/4/22	Applicant notifies DPD of consultant selected and schedules "kick-off" meeting for DPD and consultant to present SSA overview and process to the Committee.
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 6/10/22
March-April	Applicant conducts 2 community meetings to present proposed scope of services and 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
6/10/22	SSA Application Package Due. Provide an electronic copy (thumb drive) of the SSA application documents, organized so that each section of the application is saved in folders and PDF files. 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
8/1/22	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 arrange testimony from five SSA stakeholders.
November	Final SSA establishment/extension ordinance introduced to City Council
December	Once SSA ordinance is approved by City Council, it is filed with Cook County Clerk before deadline on the last Tuesday in December.
1/1/23	Service Provider can begin services if up-front 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