

REQUEST FOR PROPOSAL:

Consultant for SSA#8 Lakeview East Reconstitution

Lakeview East Chamber of Commerce

APPLICATIONS DUE: 04/15/2024

The Lakeview East Chamber of Commerce (LVECC) is accepting proposals for an Urban Planning Consultant to assist LVECC and Special Service Area staff/advisory committee to complete the 2025 SSA#8 Renewal Application as required by the City of Chicago's Department of Planning and Development. The current SSA has been in operation for over 25 years and the existing boundaries will not be changed drastically. A detailed PIN list to ensure all PINS were accurately included in the boundaries with special considerations for additional PINS will be studied throughout this process. The following steps will be required for completion of this project:

SSA Funding, Visioning and Boundaries

- a. **Project Plan.** The Consultant shall work with the SSA Advisory Committee to draft a project plan that sets target dates for the completion of action items needed to complete the application process **by June 14, 2024**. The project plan should be revised as needed to keep on schedule.
- b. **Refine Boundaries.** Consultant will define a final boundary to estimate services and costs. Properties in the boundary must be contiguous.
- c. **Prepare a Map.** The Consultant 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.
- d. **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 2023 EAVs are released in **June, 2024**. For more information see Appendix A
- e. **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 Consultant along with the Sponsor Agency shall make every effort to conduct in-person surveys with taxpayers, tenants, residents and shoppers to get a "district user" perspective.

- f. **Establish metrics and baseline data.** In coordination with the City and SSA Advisory Committee, the Consultant will work with the Sponsor Agency to determine on what basis (e.g. what metrics) the SSA's impact will be evaluated. Many of these metrics have been established.
- g. **Baseline Data** The Consultant 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.
- h. **Prepare a draft legal description.** The Consultant 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.
- i. **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 A for specifics on preparing the SSA District Plan

APRIL, 2024: SSA Outreach, Support, Refinement and Submission

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

The Consultant will work with the Sponsor Agency and SSA Advisory Committee along 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.
- c. **Support.** The Consultant will work with 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 9, 2023**. The balance of support signatures totaling a minimum of 20% of the PINs must be submitted to DPD **by August 1, 2024**. 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.

1. **JUNE 14, 2024: 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. 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.

2. **JUNE - JULY 2024: Make final corrections to the SSA Packet.** With support from relevant City agencies, Consultant will 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.**

3. **AUG - DEC 2024 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. **Consultant will help prepare for 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.**

APPENDIX A

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 2023 board certified data is being used (NOTE: Accommodation will be made for updating data depending on timing of when 2024 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 2023 (payable in 2024) levy and maximum levy. Create a pie chart for the Tax Year 2023 (payable in 2024) 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 2022 or 2023 EAV used to calculate the tax bill
 - e. Board certified 2022 or 2023 EAV captured in the Base EAV for the respective TIF (if applicable)
 - f. Board certified 2022 or 2023 EAV captured in the TIF Increment by each TIF (if applicable)
 - g. Board certified 2022 or 2023 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 estimated tax rate for 2024 levy payable in 2025 - 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 2023 payable in 2024 - 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:

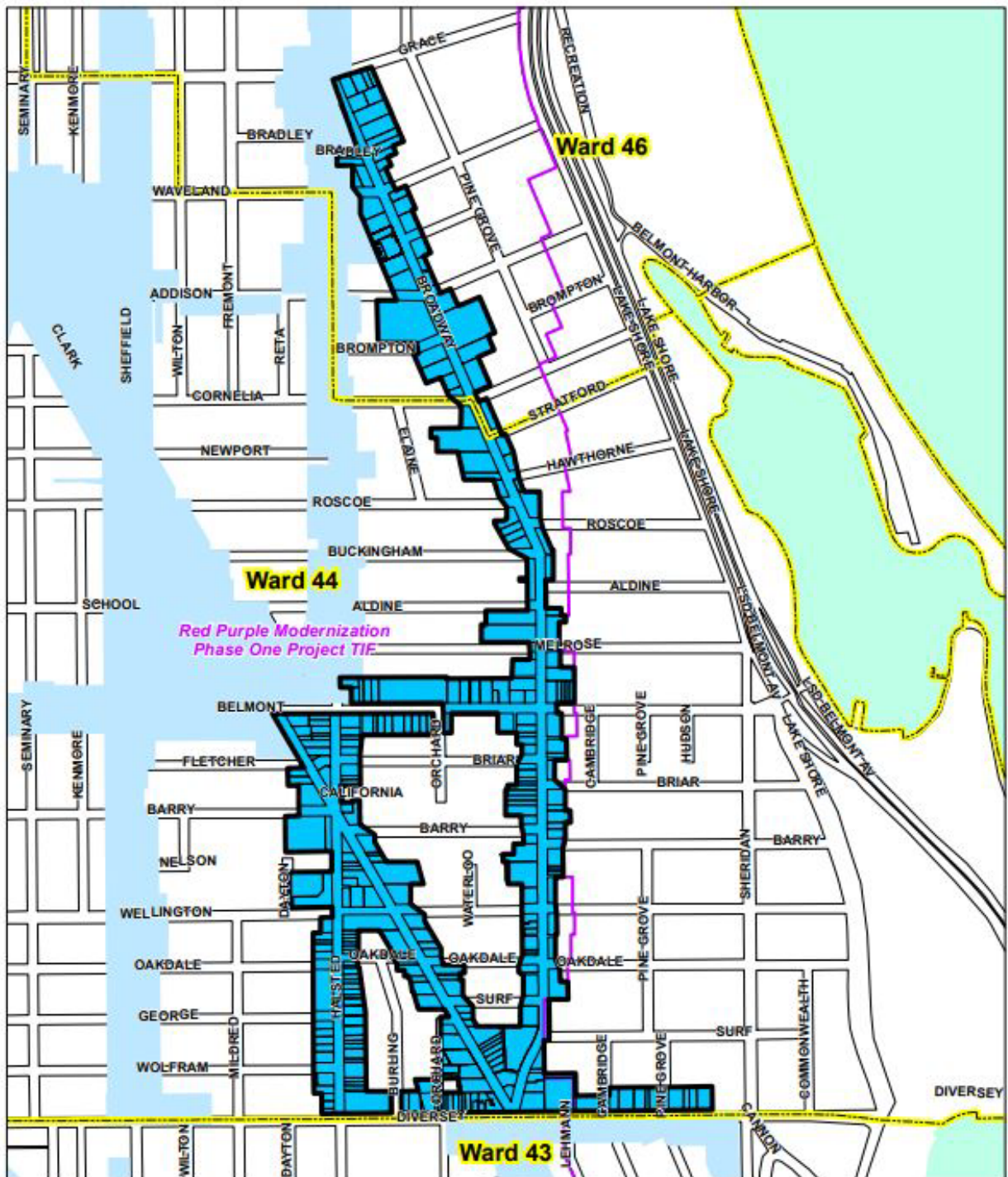
1. **SSA District Plan Executive Summary.** This shall serve as a “one-pager” on the SSA and include a brief overview including, but not limited to:
 - a. **Why the SSA?** Provide a summary as to why the new or reconstituted SSA is being proposed. Include the SSA Vision Statement.
 - b. **SSA Contacts.** 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 2021 or 2022 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 2025 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 2025 budget and projections for 2025-2029. The budget information will be used to prepare the 2025 Budget using DPD's template. Include a summary 2025 and 2025-2029 budget chart.
- h. Determine the tax rate cap and typical tax rate.** SSA tax levy money is generated by multiplying the 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. 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.)



- Legend**
- Lake View East
 - Other SSA
 - TIF
 - Wards

Lake View East SSA #8



**Please submit your proposal no later
than April 15, 2024 to:**

Maureen T. Martino
Executive Director
Lakeview East Chamber of Commerce
773-348-8608
maureen@lakevieweast.com