

CHARTING THE COURSE
BID FORMATION CHECKLIST

PHASE	CDC (or other similar group)	CITY	MERCHANTS ASSOCIATION AND/OR PROPERTY OWNERS
I	<p>4 INTRODUCE idea of creation of BID to Board of trustees, merchants group, and/or Council rep</p> <p>4 BEGIN analysis of district problems and needs</p>		
II	<p>4 DETERMINE tentative:</p> <ul style="list-style-type: none"> • boundaries • scope of services • budget for BID <p>4 OBTAIN tax maps/records of properties within borders</p> <p>6 TEST various assessment formulas</p> <p>MEET with City reps to inform them of intent to create BID</p> <p>3</p>	<p>3 REVIEW procedures to establish BID with CDC (or entity representing BID)</p> <p>3 TECHNICAL assistance:</p> <p>4 • property data collection</p> <p>4 • boundaries</p> <p>6 • assessment formula</p>	<p>4 FORM task force to work with CDC to determine tentative boundaries, scope of services</p> <p>BEGIN to develop marketing plan to create support for the BID</p> <p>4</p>
III			<p>4 CREATE formal steering committee</p> <p>4 FIRST formal contact with property owners as a whole -- mailing, meetings, one on one canvassing</p> <p>4 INITIATE series of community meetings</p>
IV	<p>CONTACT Council rep, if not already done</p> <p>4 SUBMIT final boundary map and list of property owners to City for verification.</p>	<p>4 ENG. & CONSTRUCTION:</p> <ul style="list-style-type: none"> • prepare legal description of BID boundary • verify front footage #'s <p>ASSESSMENTS & LICENSES:</p> <p>7 • verify property values/ownership/ outstanding assessments</p> <p>7</p>	<p>4 ONGOING efforts to "sell" the BID concept</p> <p>4 INFORMAL tracking of property owner support to meet thresholds in State law (60% front footage or 75% land area)</p>
V	<p>7 PREPARE petition for establishment of district and boundary approval</p> <p>PETITION property owners</p> <p>4 PREPARE and initiate process for Article of Incorporation</p> <p>5 PREPARE Services Plan and final budget</p> <p>6 SELECT and calculate final assessment methodology</p>	<p>LAW Department:</p> <p>4 • Review of draft petition</p> <p>7 • Prepare and introduce legislation approving BID and Services Plan</p> <p>ASSESSMENTS & LICENSES:</p> <p>• Verify signatures on petition</p> <p>7 • Verify threshold for property owner support</p> <p>INFORM in-house committee about upcoming petition</p>	<p>ONGOING efforts to "sell" the BID concept</p>

PHASE	CDC (or other similar group)	CITY	BID (Newly Formed)
VI	7	7 INFORMAL administrative review of plan 7 MEET with In-House BID committee 7 COMMITTEE and/or affected departments determine Protocols – level of base line services	4 ONGOING efforts to “sell” the BID concept APPROVE Protocols — baseline service determination
VII	PRESENT boundaries and Articles of Incorporation to City Council	REFER to City Planning Commission and/or Council Committees for adoption 8 APPOINT City reps to Board of Trustees	8 After BID is approved by Council: • FILE Articles of Incorporation with the State • CREATE BIDs Board of Trustees • HIRE a manager/staff • CONTRACT with CDC (optional)
VIII		6 TECHNICAL assistance: Assessment methodology 7 LAW prepares contract with BID to collect assessment and to accept bidding procedures	5 PREPARE plan of services and final budget 6 SELECT and calculate final assessment methodology
IX			4 ONGOING efforts to “sell” the BID concept APPROVE Protocols--baseline service determination
X		REFER to City Planning Commission and/or Council Committees for adoption	7 SUBMIT plan to Council 7 ENTER into contract with City 7 SECURE first year funding
XI		7 INITIATE legislation for Ordinance to Proceed with assessment	SEND out RFP and solicit bids
XII			CONTRACT for services and perform work
XIII		7 INITIATE legislation to levy assessment 6 LEVY the assessment and transfer funds to BID	8 PREPARE annual financial reports

The BID Formation Checklist provides an overview of the technical support the City can provide and the appropriate phases in the process that such assistance will be available.

For more information contact Bob Brown at:

Cleveland City Planning Commission – 664-2210
Chapter 3: The Big Picture