

REQUEST FOR QUALIFICATIONS/PROPOSALS (RFQ/RFP)

8500-50 Lehigh Avenue Transit-Oriented Development Acquisition & Redevelopment of a Village-Owned Site

Issued by the Village of Morton Grove, Illinois
March 7, 2025

Village of Morton Grove
6101 Capulina Avenue
Morton Grove, Illinois 60053
www.mortongroveil.org

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I. Introduction

The Village of Morton Grove (“Village”) seeks to engage a qualified developer (“Developer”) to acquire and redevelop the Village-owned property at 8500 and 8550 Lehigh Avenue (“Site”), which is located across the street from the newly redeveloped Morton Grove Metra commuter rail station.

The site is located within the Lehigh/Ferris Subarea, which is situated just south of Dempster Street and east of the Cook County Forest Preserve, less than one mile west of the Edens Expressway (I-94). Generally, the boundaries of the Subarea are Dempster Street to the north, Main Street to the south, the Cook County Forest Preserve to the west, and Callie Avenue to the east. The overall vision for redevelopment of the Lehigh/Ferris Subarea is to transform the area into a transit-oriented development (TOD) neighborhood consisting of higher density residential and mixed-use buildings, commercial uses, and walkable, pedestrian-friendly streets.

The Village maintains a preference for mixed-use, multi-family residential, attached single-family residential, or sales tax-generating commercial development for the Site. **Applicants may submit and the Village may consider individual development proposals for 8500 Lehigh Avenue and 8550 Lehigh Avenue, or a combination thereof.**

Enclosed are a schedule of submission, community background, site information, required proposal contents, proposal submission instructions, and supporting information.

The Statement of Qualifications (SoQ) and associated Proposals must be received by the Village by 3:00 PM (local time) on Friday, May 9, 2025. There will be no formal opening for the SoQ/Proposals. The SoQ/Proposals should be submitted in accordance with the proposal submittal instructions outlined in Section VII.

II. Schedule of Submission

DATE	TIME*	DEADLINE
Friday, March 7, 2025	3:00 PM	Request for Qualifications & Proposals Issued
Friday, April 4, 2025	5:00 PM	Deadline for Questions
Friday, April 11, 2025	5:00 PM	Final Response to Questions/Addenda Issued
Friday, May 9, 2025	3:00 PM	Statements of Qualifications & Proposals Due

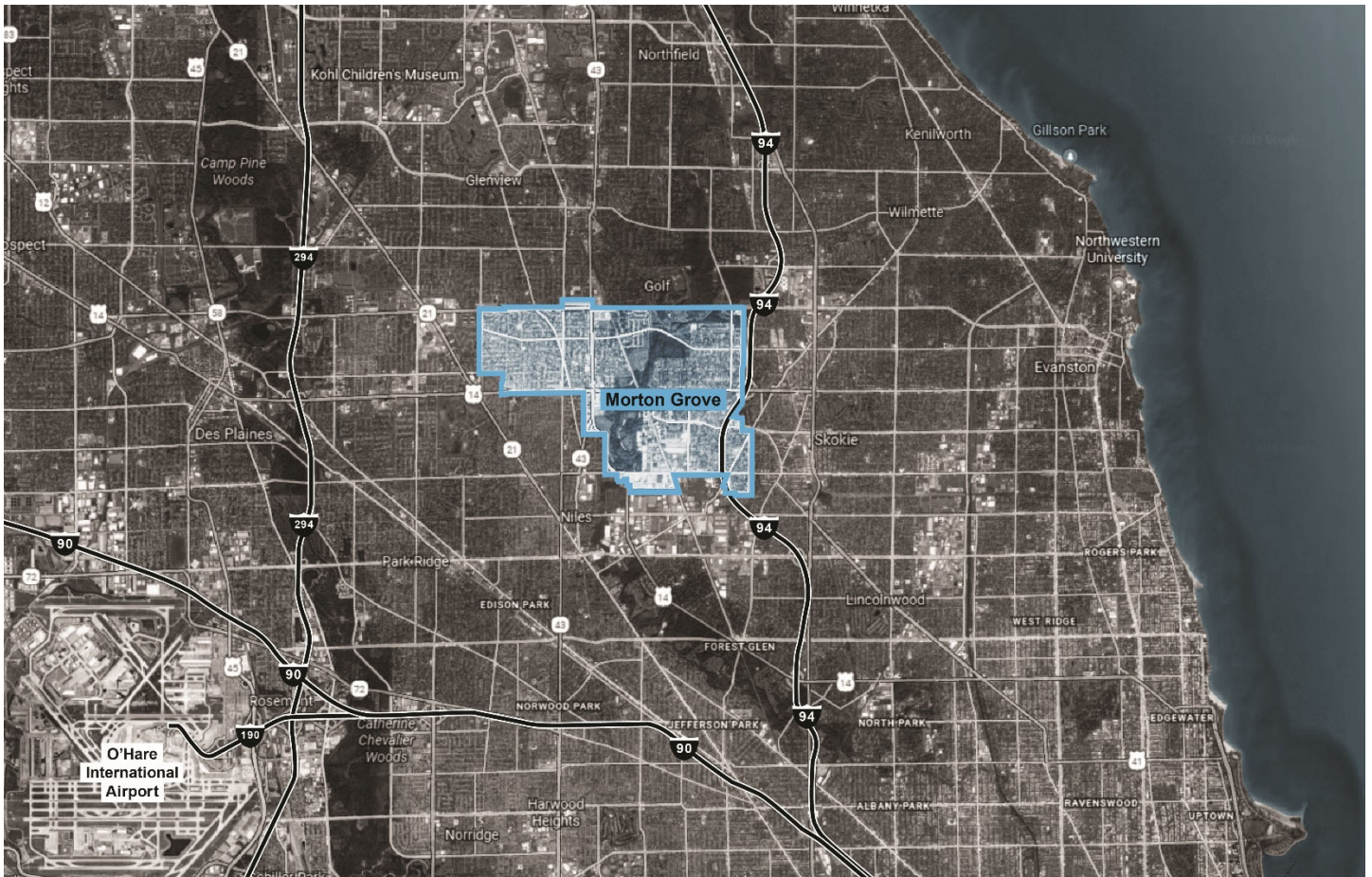
**All times are Central Standard Time (CST)*

III. Community Background

The Village of Morton Grove, Illinois, is a mature community of approximately 25,000 residents located in the near north suburbs of Chicago, Illinois. The community is bordered by Niles, Glenview, Golf, and Skokie and is located 15 miles northwest of the Chicago Loop. Residents and businesses benefit from excellent access to the Chicagoland region by way of a Metra commuter rail line, Pace bus service, and interstate highways I-94 (Edens Expressway) and I-294 (Tri-State Tollway).

The Village contains 5.2 square miles of land area, of which approximately 20% is owned by the Forest Preserves of Cook County. The forest preserve is a distinguishing feature of Morton Grove as it bisects the community and provides residents with direct access to the regional North Branch Trail including 3.4 miles of trail within the municipal boundary. Morton Grove's wooded areas, trails, riding stables, public fee golf course, and bike and equestrian paths provide for a range of recreational activities.

Morton Grove's median household income is \$106,078, which is significantly higher than the median income for Illinois households (\$80,306). The median home value is \$377,000 and 84.5% of housing units are owner-occupied. The community is proud of its rich diversity and celebrates the fact that 38.1% of residents were born outside of the United States (2023 American Community Survey 5-year estimates).



Morton Grove Location Map

IV. Site Information

Lehigh/Ferris Subarea

The Site is located within the Lehigh/Ferris Subarea, which was the subject of the 2009 Lehigh/Ferris Subarea Framework Plan. The Lehigh/Ferris Subarea is located just south of Dempster Street, east of the Cook County Forest Preserve, less than one mile west of the Edens Expressway (I-94) and the I-94/Dempster Street interchange. The Subarea is bisected by the Metra Milwaukee District/North rail line, which runs diagonally through the Subarea and carries Metra and Amtrak passenger trains, as well as a limited amount of freight traffic.

The Village established the Lincoln/Lehigh Tax Increment Financing (TIF) Redevelopment Project Area (RPA) in 2021 as a means to promote orderly redevelopment of numerous vacant and underutilized properties near the Metra commuter rail station at Lehigh and Lincoln Avenues. The Lincoln/Lehigh TIF District or Redevelopment Project Area (RPA) is generally situated between Lehigh Avenue to east and Nagle Avenue to the west, and between Chestnut Street to the north and the approximate continuation of Madison Court to the south. The district has facilitated the development of an 89-unit townhome project and the Village's \$3.7 million redevelopment of the Metra station which anchors the district.

The Lehigh/Ferris Subarea currently consists of a mix of light industrial, residential, commercial, and institutional uses. In recent years, several large industrial businesses have left, allowing for the development of large residential projects in and around the Lehigh/Ferris Subarea. These include:

- **The Crossings of Morton Grove:** This 64-unit townhome development by Toll Brothers is located just north of Capulina Avenue and west of Ferris Avenue.
- **Ferris Plaza:** This shopping center consists of 8,000 square feet of commercial/retail space along Dempster Street, just east of Ferris Avenue.
- **Lexington Walk:** Construction was completed in 2019 on this 36-townhome development at the southwest corner of Ferris and Capulina Avenues, just east of the Metra rail line.
- **Metro on Main:** This 89-unit townhome development by Lexington Homes is currently under construction and is already approximately 80% sold.
- **Trafalgar Square Condos:** This project by Neri Development consists of 150 condominium units in two buildings and is located along Concord Drive.
- **Trafalgar Square Townhomes:** Located next to Trafalgar Square Condos are the Trafalgar Square Townhomes. Developed by Lennar, this project consists of 110 townhomes.
- **The Woodlands of Morton Grove:** Located just south of the Lincoln/Ferris intersection, this project was developed by Elliott Builders and consists of 319 condominiums and 77 townhomes.

The Village is seeking a developer or development team whose proposed project will complement recent development efforts in the Lehigh/Ferris Subarea and help the Village achieve its goal of creating a pedestrian-oriented downtown with a vertical and horizontal mix of uses. Development within the Lehigh/Ferris Subarea should be consistent with fundamental design principles of TOD, which concentrate on creating connectivity between land uses and attractive, walkable streets.

The Site is located immediately across Lehigh Avenue from the Village's Metra commuter rail station which is currently being reconstructed, adjacent to the Forest Preserves of Cook County and North Branch Trail, and walking distance to the Morton Grove Public Library, the Morton Grove Civic Center, the Morton Grove Park District Harrer Park and Pool, and restaurants, retail and service establishments located along Lincoln Avenue and Dempster Street. The Site is also a short distance to regionally known restaurants with Moretti's, the Bringer Inn, Burt's Pizza, and Pequod's. The Site's users will also benefit from proximity to the 26-acre Sawmill Station lifestyle center, which completed construction in 2021, at the southeast corner of Dempster Street and Waukegan Road. The center features an Amazon Fresh grocery store, LA Fitness, Cooper's Hawk, Raising Cane's, Starbucks, Chipotle, Ross, and Kohl's. The center is also the location of The Residences at Sawmill Station, a 250-unit fully leased luxury rental property.

8500-8550 Lehigh Avenue

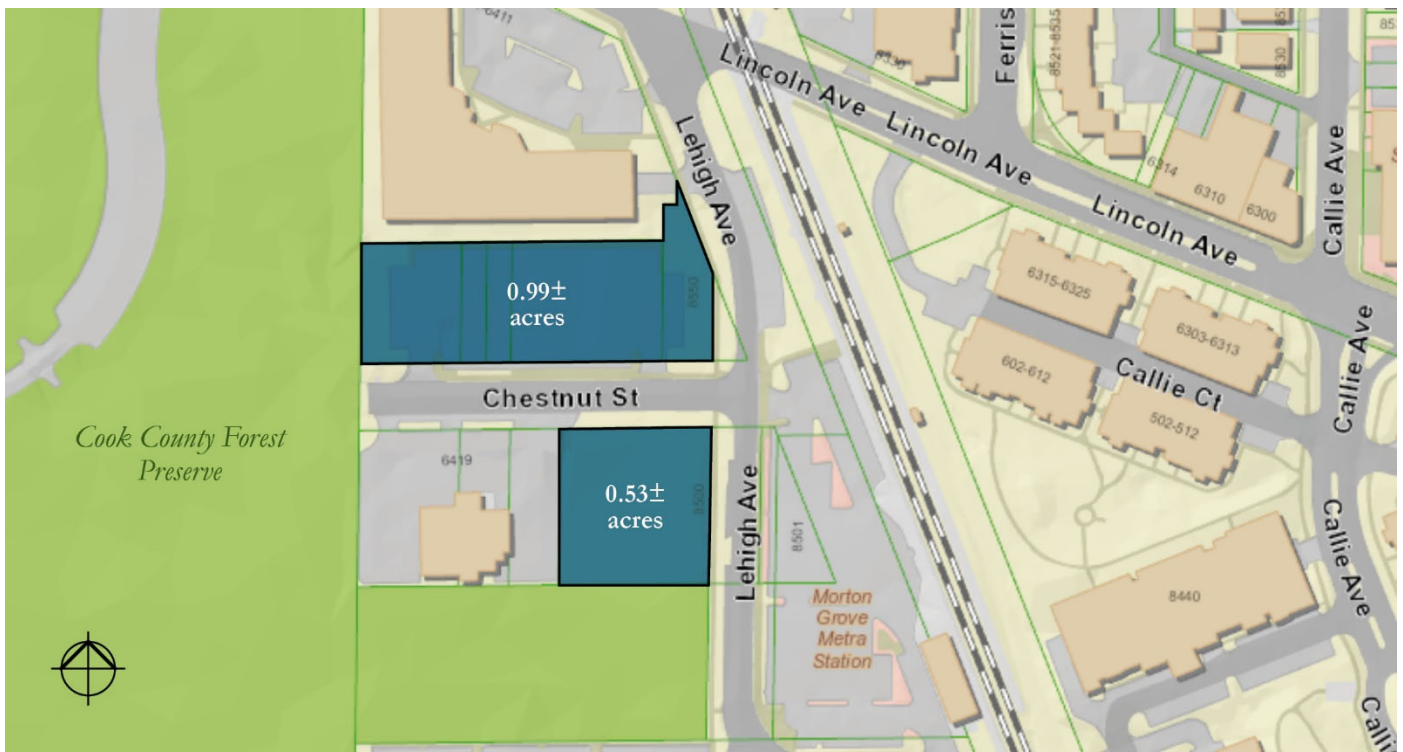
The Site is situated at the intersection of Lehigh Avenue and Chestnut Street, one block south of Lincoln Avenue, and contains approximately 66,200 square feet (1.52 acres) of land area. The site is located directly west of the Morton Grove Metra commuter rail station, across Lehigh Avenue. The Site is bisected by Chestnut Street, which dead ends at the Forest Preserves of Cook County located directly west and south of the subject property. The Site has long been seen as an opportunity for TOD given its proximity to the Morton Grove Metra station. The Morton Grove Metra station is currently being updated and expanded with a new station building becoming operational in Summer 2025.



Site Context Map



Morton Grove Metra Station Rendering (Left) and Site Plan (Right)



Site Location Map

Site Conditions

Dimensions: The parcel at 8500 Lehigh Avenue measures approximately 23,200 square feet (0.53 acres) and the parcel at 8550 Lehigh Avenue measures approximately 43,000 square feet (0.99 acres). In total, the Site includes approximately 66,200 square feet (1.52 acres) of land area. The linear dimensions of the site's boundary are provided in Attachment B, Site Dimensions.

The Site is bisected by Chestnut Street, which could be vacated at the discretion of the Village to increase the overall site area, as long as vehicular access is maintained to the Morton Grove Moose Lodge at 6419 Chestnut Street. A vacation of Chestnut Street will increase the area of the Site by approximately 23,000 square feet (0.53 acres). The inclusion or exclusion of a Chestnut Street vacation will have no bearing on the selection of the developer for the Site.

Access: The Site is served by Lehigh Avenue and Chestnut Street. The Village is open to development plans that include a vacation of Chestnut Street, as long as vehicular access is maintained to the Morton Grove Family Moose Lodge. Village standards for accessways are provided in Chapter 9 of the Unified Development Code (forms.mortongroveil.org/code/).

Improvements: The parcel at 8500 Lehigh Avenue is currently vacant and the parcel at 8550 Lehigh Avenue is improved with a surface parking lot used for Metra commuter parking.

Morton Grove Moose Lodge 376 (6419 Chestnut Street): The Site abuts property owned and occupied by the Morton Grove Moose Lodge. The Moose Lodge property is located at 6419 Chestnut Street, on the south side of Chestnut Street, and measures approximately 31,200 square feet (0.72 acres) in land area.

The Village is willing to facilitate initial discussions between Moose Lodge leadership and the Developer, but the Village does not represent the Moose Lodge and cannot act on the organization's behalf. The Village is not requiring or looking to influence the developer or the Moose Lodge in favor or against the inclusion of the Moose Lodge property in any aspect of the development proposals. Any redevelopment plan that includes the Moose Lodge property will require a separate purchase agreement between the developer and the organization.

The inclusion or exclusion of the Morton Grove Moose Lodge property will have no bearing on the selection of the developer for the Site. If the site is excluded, the proposed redevelopment plan must maintain legal vehicular access to the site and be compatible with the Moose Lodge's continued use of the property. Inquiries regarding the Moose Lodge site should be made to lodge376@mooseunits.org.

Services: The Site is currently served by water with sufficient capacity associated with new development of the scale anticipated for the Site, but this should be verified by the developer. It will be the responsibility of the developer to provide all required connections from the existing mains on Lehigh Avenue to serve the Development. Coordination with the Village will be needed for site improvements and public infrastructure per a negotiated redevelopment agreement.

Environmental: In 2008 and 2009, Phase I environmental site assessments were completed by K-Plus Consulting for the four former industrial properties that comprise 8500 and 8550 Lehigh Avenue. K-Plus Consulting did not identify any Recognize Environmental Concerns such as prior use concerns, storage or use of hazardous materials, aboveground storage tanks, underground storage tanks, or polychlorinated biphenols containing equipment. Additional soil borings will be needed to confirm soil conditions and groundwater elevations, and inform site preparation and pavement support recommendations. A copy of the report may be requested by contacting the Village at commdev@mortongrovel.org prior to the deadline for questions.

Building, Fire, & Life Safety Codes: The Development will need to comply with all applicable building, plumbing, electrical, fire, life safety, and stormwater regulations.

Zoning: The Site is within the C/R Commercial/Residential Zoning District. Development standards for the C/R District are found in Section 12-5-7 of the Unified Development Code (forms.mortongrovel.org/code/). While the redevelopment of the Site is subject to the provisions of the Unified Development Code, developers should not feel constrained by the dimensional regulations of the C/R District. The Village anticipates the preferred development plan will be approved as a Planned Unit Development (PUD), which allows modifications to the development regulations in order to obtain the highest and best use of the site. Proposals should remain sensitive to adjacent land uses and provide a scale of development that is compatible with the existing neighborhood.

Tax Increment Financing (TIF) District: The Site is within the Lincoln/Lehigh Tax Increment Financing (TIF) District, which was established in 2021.

Site Development Goals:

- Mixed-use, multi-family, attached single-family, or tax-generating commercial development that aligns with the Village's vision for a pedestrian-friendly and transit-oriented downtown with a vertical and horizontal mix of uses.
- Development that prioritizes pedestrian and bicycle access and provides users with amenities that support active transportation modes.
- Development that is compatible with and integrates with existing development patterns in the Lehigh/Ferris Subarea.
- Development that provides Morton Grove residents with desirable commercial amenities and/or diversity in housing.
- Development that serves area residents, Metra commuters, and the significant daytime workforce concentrated in the industrial and office district to the south.
- Full vehicular access to the Morton Grove Family Moose Lodge (6419 Chestnut Street) must be maintained. However, access does not need to be provided using the current Chestnut Street configuration. Developers are encouraged to explore creative site development and vehicular access plans to serve the proposed and existing uses.
- Given that the Morton Grove Metra commuter rail station is one of the busiest in the area, the Village encourages developers to consider allocating some on-site parking for shared daytime use by Metra riders. Because the Village understands that physical and financial constraints of providing such commuter parking, the retention of Metra parking spaces is not a project requirement.

V. Roles & Responsibilities

Village Roles & Responsibilities

The Village is committed to undertaking the following as part of a redevelopment agreement (RDA):

- ✓ Sell the Site properties to the developer in their current condition.
- ✓ Consider any requests for TIF assistance, based on perceived return on investment and subject to Board approval. TIF assistance may be available to the Developer to assist with any “extraordinary” development costs, in accordance with the state TIF Act and the Lincoln/Lehigh TIF Ordinances.
- ✓ Work with the developer and the Moose Lodge, as necessary, to vacate all or a portion of Chestnut Street while maintaining required vehicular access to the development and the existing Moose Lodge.
- ✓ Facilitate discussion with the Moose Lodge, as necessary, regarding the sale and redevelopment of the Moose Lodge property if the site is included in the redevelopment plan.
- ✓ Provide surveys of and Village records pertaining to the Site.
- ✓ Provide guidance to the development team through the development review, entitlement, and permitting processes.

Developer Roles & Responsibilities

The successful developer's responsibilities include the following:

- ✓ Review any and all environmental reports prior to finalizing the redevelopment agreement and land sale.
- ✓ Review all zoning, building, fire, and other applicable regulations and development guidelines, and other key planning documents prior to submitting a proposal and making a formal offer for the land. Documents that are or will be available include:
 - **Unified Development Code, Village of Morton Grove**
 - Title 12: <http://forms.mortongroveil.org/code/>
 - **Lehigh/Ferris Framework Plan** (January, 2009)
 - Volume 1: <https://www.mortongroveil.org/wp-content/uploads/L-FVol1-200901-1.pdf>
 - Volume 2: https://www.mortongroveil.org/wp-content/uploads/L-FVol_2-200901.pdf
 - **Lincoln/Lehigh TIF Redevelopment Project and Plan** (October, 2021)
 - <https://www.mortongroveil.org/wp-content/uploads/DRAFT-REDEVELOPMENT-PLAN-FINAL-211006.pdf>
 - **Morton Grove Comprehensive Plan** (October, 1999)
 - <https://www.mortongroveil.org/business-development/community-and-economic-development/planning/>
 - **Other documents at the request of the developer.** Please direct all requests to commdev@mortongroveil.org.
- ✓ Purchase the Village-owned property for the agreed price.
- ✓ Identify the amount of TIF assistance that the developer is seeking from the Village for any “extraordinary” costs, and substantiate the need for such assistance.
- ✓ If the Moose Lodge property is included in the redevelopment plan, purchase the privately owned property and meet all terms of the purchase agreement.
- ✓ Develop the site and complete public improvements pursuant to the proposal and redevelopment agreement no later than two (2) years after date of purchase.

VI. Required Proposal Contents

PART 1. COVER LETTER AND INTRODUCTION

Provide a concise and focused overview to introduce your company and company background. Include an executive-level summary of the overall SoQ/proposal and a statement identifying the name of the lead contact person with a contact email address and phone number.

PART 2. STATEMENT OF PROJECT UNDERSTANDING & DEVELOPMENT APPROACH

- 41 Statement of understanding of the project and Village's goals.
- 51 Brief description of the development approach to the site(s), including land uses and orientation, and any relevant market basis for the concept.
- 61 Description of how the project will meet the Village's goals for the site(s) and how it will contribute to the creation of a pedestrian-oriented downtown area within the Lehigh/Ferris Subarea.

PART 3. TEAM DESCRIPTION

To the extent that such companies and/or persons have been selected, the development team should be identified, including: the architect, construction consultant, contractor, economic-financial consultant, and marketing/leasing/management companies, and business owners/operators. Depending on the overall scope, the team may include as few or as many firms as necessary. For selected companies/persons on the development team, the following is required:

1. Identification of all principals who will be involved in the project, including their roles, responsibilities, and authorities.
2. Explanation of the size of each firm and the depth of experience of their personnel.
3. Resumes of key persons involved with the development of the project itself and/or with the operation or management of the proposed businesses.
4. Potential Conflicts of Interest: The developer must identify any principals or investors in the company that are employees of the Village government or members of an appointed commission, committee or board. Any principals or investors in the company who are related by blood or marriage to any key employees, elected officials or appointed commissioners must also be identified.
5. Description of how your team and experience will help to ensure a successful project.

PART 4. ORGANIZATIONAL STRUCTURES AND WORKLOAD

1. Legal name of development and managing entities that will be considered the developer.
2. Business form (corporation, partnership, LLC, individual, joint venture, not-for-profit, etc.).
3. Date established (for constituent firms, if joint venture).
4. If the developer is a single-purpose entity, a subsidiary, or an affiliate of any other corporation, list such entity or entities including name, address, relationship to developer, and officers and directors.
5. Names, addresses, title of positions, and nature and extent of the interest of the officers and principals, shareholders, and investors of the developer, the development entity, and the parent entities for a single purpose entity as follows:
 - For corporations, the officers, directors, or trustees, and each stockholder owning more than ten percent of any class of stock.
 - For partnerships or limited liability corporations, each partner or member, whether a general or limited partner or member, and either the percent of interest or a description of the character and extent of interest.

- For joint values, each participant and either the percent of interest or a description of the character and extent of interest. If joint venture partners, each participation and either the percent of interest or a description of the character and extent of interest. If the joint venture partners are corporations or partnerships, then the information for such firms should be provided.
6. Number, location, and magnitude of projects scheduled for 2020 through 2022.
 7. A current estimate of approved, constructed, and unsold units and unleased space, by project.
 8. A proposed organizational structure for the team showing the roles of each team member, key personnel, and lines of authority/responsibility.

PART 5. DEVELOPMENT TEAM EXPERIENCE

1. Demonstrated experience with at least two projects and/or businesses of similar size and quality as proposed.
2. Demonstrated financial resources and commitments to acquire and develop the property (may be provided in confidential financial statements, evidence of equity and debt financing, etc.).
3. Demonstrated commitment to the overall goals of the Village, generally, and specifically with respect to goals identified in this RFQ/P.

PART 6. REFERENCE PROJECTS

Provide a minimum of two (2) project references that are similar in scope, complexity, and/or any other distinguishing feature where you anticipate providing comparable service. The project reference summaries should include: the project/business location, an overview of the project size and scope, any specific challenges with the development of the project or operation after completion, a description of how your development team successfully addressed any such challenges, and a summary of key successes associated with the project/business development. Each referenced project must include the length of time to develop the project, the approximate total project cost, and a description of how the project was financed. Business owners should also include the number of years the referenced project/business has been open/operating and any expansions or modifications since the original opening date.

PART 7. CUSTOMER REFERENCES

Provide a minimum of two (2) and no more than four (4) professional references. Include their organization name, address, contact person, and contact information as well as a brief description of their project. It is recommended, though not required, to list references associated with the reference projects in Part 6.

PART 8. CONFIDENTIAL FINANCIAL AND LEGAL INFORMATION

One copy of the following information should be submitted in a separate sealed envelope and will be kept confidential:

1. Audited financial statement or federal income tax returns for the developer for the last three (3) years. Statements for parent entities or operating companies should be provided in the case of single-purpose entities.
2. References from financial institutions with whom the developer has dealt as a borrower or as a joint venture partner, and/or with whom the developer intends to finance this project.
3. Proposed sources of financing and preliminary evidence of interest from financial institutions or partners, if available.
4. List of litigation or other disputes with which the developer, development entity, or joint venture partners or business owners have been involved in the past five years, including status, potential of a financial settlement, and impact on your ability to execute this project.
5. If the firm or any individual on the development team has ever filed for bankruptcy or has had projects that have been foreclosed (or returned to lenders via deed-in-lieu of foreclosure), list dates and circumstances.

PART 9. DEVELOPMENT PROPOSALS

Proposals should be of sufficient detail to illustrate the developer's development concept. Scaled drawings should include building and parking lot dimensions, pedestrian access ways, driveway and vehicular access ways, and landscape areas. The development proposal should include:

1. Conceptual site plan, showing pedestrian and vehicular circulation and site context;
2. Overview of the building program, including the proposed type, size, and mix of any residential units; the type and size of any proposed commercial uses; the proposed height and number of stories of the structure(s); and the number of proposed parking spaces;
3. Renderings and/or elevations, including proposed materials and suggested color schemes;
4. General list of potential zoning relief approvals;
5. Estimated development budget;
6. Anticipated construction schedule;
7. Proposed financial structure and status of financing or evidence of financial commitments;
8. Five-year pro forma financial projections and operating revenue, expenses for investment or rental product, and/or projections during the sell-out periods of any for-sale units;
9. Management plans operation and/or the leasing/sale marketing plan;
10. Projected payments to the Village for land, clearly indicating the overall price being offered for the land and expected participation by Village in any of the above pro-forma returns;
11. If TIF assistance is being requested, a completed Village of Morton Grove Tax Increment Financing (TIF) Application Packet, provided as Attachment D; and
12. Projected financial benefits to the Village, including, but not limited to: site purchase price, projected property tax revenues, and projected sales tax revenues.

PART 10. SIGNED RESPONSES

Authorized agents shall be required to sign the Statement of Qualifications/Proposals signature form (Attachment 1) and include in the SoQ/Proposal. Electronic submissions may use a digital representation of a signature.

VII. Proposal Submittal Instructions

- Two (2) hard-copies of the SoQ and Proposal, along with a digital version of the entire submittal packet should be delivered to:

**Richard T. Flickinger Municipal Center
6101 Capulina Avenue
Morton Grove, IL 60053
Attn: Brandon Nolin, Community Development Administrator**

SoQ/Proposals mailed by but not received by 3:00 PM (CST) on Friday, May 9, 2025, will not be considered. Submissions transmitted by email will not be accepted.

- SoQ/Proposals shall be prepared using format provided in this request. Each required part must be delineated.
- Before submitting the SoQ/Proposal, the respondents should carefully examine the document specifications. By submission of a SoQ/Proposal, the respondent will be understood to have read and fully informed themselves as to the contents of the RFQ/P documents.
- Questions regarding the RFQ/P should be submitted in writing to commdev@mortongroveil.org.
- All firms and development teams interested in participating in this RFQ/P process should email the name of their entity and the primary point of contact (name and email address) to commdev@mortongroveil.org no later than January 14, 2020, so that your team will be advised of any and all amendments and/or clarifications to the RFQ/P.
- Should a respondent find any discrepancies, omissions, ambiguities, or conflicts within the RFQ/P documents, or have any questions as to their meaning, the respondent may email a request for correction or clarification to commdev@mortongroveil.org. Village representatives will review such requests and if appropriate, issue one or more clarifying “Notice to Respondents” which will become part of the RFQ/P document. The last date for the submission of questions is **5:00 PM (CST) on Friday, April 4, 2025**, and final responses will be emailed to all interested parties no later than **5:00 PM (CST) on Friday, April 11, 2025**.
- After the SoQ/Proposal filing deadline, the Village of Morton Grove may conduct discussions with one or more respondent who submits an acceptable SoQ/Proposal. During the course of such discussions, the Village shall not disclose any information derived from one SoQ/Proposal to another respondent.

VIII. Selection Criteria

The Village will evaluate the SoQ/Proposals based on the following criteria:

- Developer responsiveness to this RFQ/P and demonstrated understanding of the Village's development goals for the site(s) and for the Lehigh/Ferris Subarea, in general.
- Qualifications and experience of developer and team members with projects of similar scale and magnitude.
- Experience and reputation of personnel identified for this project.
- Past performance of firms as verified by references of previous clients/projects, including demonstrated ability to work with local government and/or past successes with similar types of projects/businesses.
- Financial capability, including resources available as equity for the project and strength of financial commitments.
- History of legal actions and disputes.
- Organizational and managerial capacity to handle a project of this size, including work load and product/project overlap.
- Quality, creativity, and feasibility of proposal.
- Overall economic benefit to Village.
- Overall project schedule and anticipated completion/opening dates.

VILLAGE'S RIGHT TO REJECT ANY AND ALL SUBMITTALS

The Village of Morton Grove reserves the right, at its sole discretion, to reject any or all submittals when, in its opinion, it is determined to be in the public interest to do so; to waive minor irregularities and informalities of a submittal; or to cancel, revise, or extend this solicitation. This Request for Developer Qualification/Proposals does not obligate the Village of Morton Grove to pay any costs incurred by any respondent in the submission of a proposal or in making necessary studies or designs for the preparation of that proposal, or for procuring or contracting for the services to be furnished under this Request for Developer Qualifications/Proposals.

For questions concerning this RFQ/P, please email commdev@mortongroveil.org.

ATTACHMENT A

STATEMENT OF QUALIFICATIONS SIGNATURE FORM

Request for Qualifications/Proposals (RFQ/RFP)
8500-50 Lehigh Avenue Transit-Oriented Development

Village of Morton Grove, Illinois
Issued March 7, 2025

Organization: _____

Address: _____

City, State, Zip: _____

Contact Person: _____

Telephone Number: _____

E-mail: _____

Signatures of your firm's authorized representatives:

Name: _____

Title: _____

Signature: _____

Date: _____

Name: _____

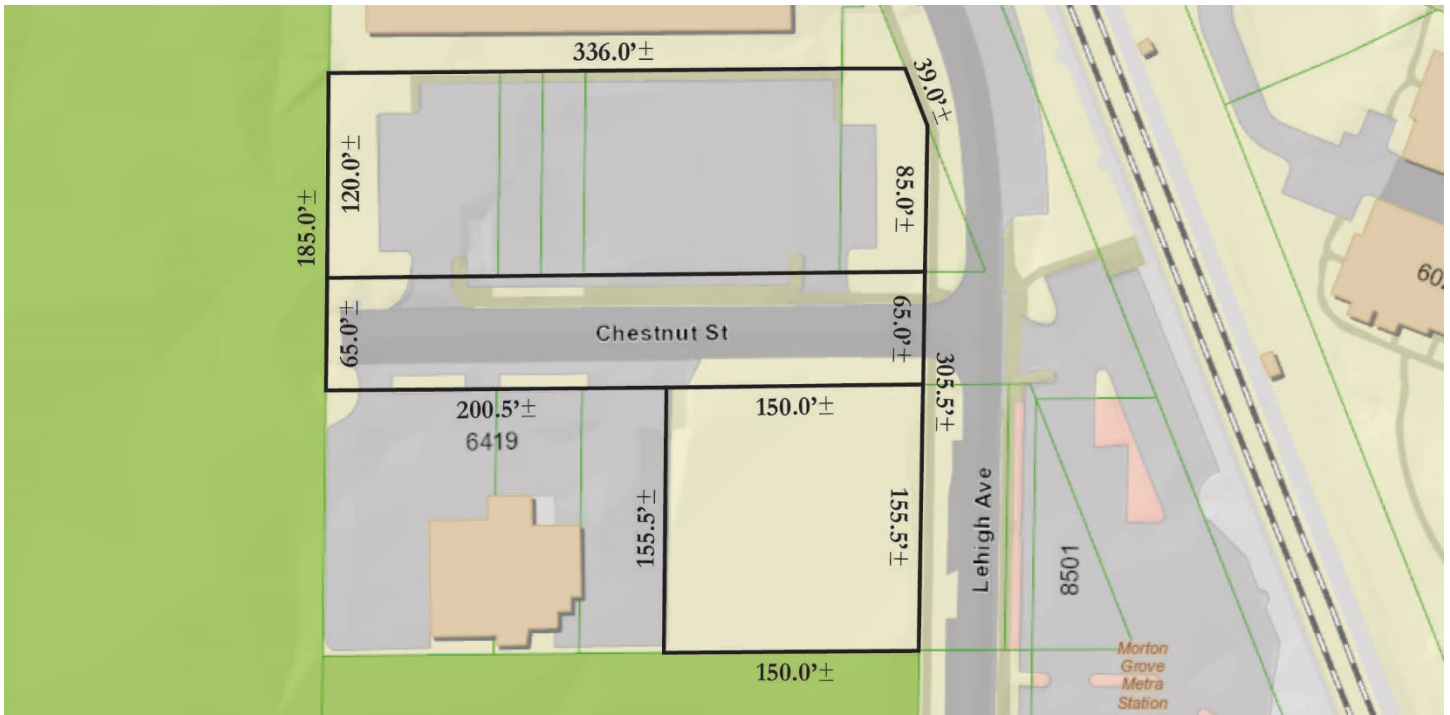
Title: _____

Signature: _____

Date: _____

ATTACHMENT B

SITE DIMENSIONS



ATTACHMENT C
PLAT OF SURVEY

CONTAINING 1.518 ACRES +/-

HX=15.47
 LVE=879.02
 LVE=820.10
 WGR=LOVE=820.42

ATTACHMENT D
VILLAGE OF MORTON GROVE
TAX INCREMENT FINANCING (TIF) APPLICATION PACKET



Village of Morton Grove Tax Increment Financing (TIF) Application Packet

The Village of Morton Grove created two Tax Increment Financing redevelopment areas to promote orderly redevelopment in the Village. Incremental taxes are used to fund public infrastructure improvements and may also be used to fund private redevelopment projects that satisfy the redevelopment goals of the TIF District.

In order that the Village can effectively evaluate a request for TIF assistance, essential project information must be submitted for review. All applicable items should be included in a single submission. Failure to provide accurate, complete, and required information may delay the review of your request.

Any agreement to use Tax Incremental Financing (TIF) for a private project is subject to the review and authorization of the Village Board. All use of tax incremental financing must be in accordance with the Illinois TIF Act (65 ILCS 5 / Art. 11 Div. 74.4).

General Project Information

- 1) One-Page Summary – Provide a summary of the project that does not exceed 1 page in length. Include only the essential information about the project. Details must include: description of site or building, including address; current and proposed uses; description of end users; project start and end dates; name of developer and owner; total development costs; overview of private-sector financing; amount of TIF assistance requested; statement regarding why TIF is essential; increment projections; profitability; and description of public benefits.
- 2) Contact Information – Names and contact information for key members of the development team.
- 3) Project Narrative – Provide an in-depth overview of the project in narrative format. The narrative must include a description of the following aspects of the project.
 - a) Current condition of site and historical overview including: size and condition of any existing structures, environmental conditions, and past uses of the site;
 - b) Proposed uses of project (e.g. commercial, retail, office, mixed use, residential for sale or for rental, senior housing, etc);
 - c) Construction information about the project including: size of any existing structure to be demolished or rehabbed; size of any new construction; types of construction materials (structural and finish); delineation of square foot allocation by use; total number and individual square footage of residential units; type of residential units (eg for-sale, rental, condominium, single-family, etc); degree of affordability of residential units (ie market rate, 80% AMI, 60% AMI); number and type of parking spaces; and construction phasing;
- 4) Site Maps – Provide a map that shows the location of the site. Also provide a map that focuses on the project and its immediate surroundings. Both maps should be no larger than

11x17. Larger maps will be required when the project is presented to the Village Board and applicable Village Commissions.

- 5) Renderings of Project – Provide preliminary architectural elevations, plans and renderings for the project. These drawings should be no larger than 11x17. Larger drawings will be required when the project is presented to the Village Board and applicable Village Commissions.
- 6) List of PINs – Identify the specific Parcel Index Numbers (PINs) included in the proposal. Also include the “base” EAV for each of these PINs. This information can be obtained in the Redevelopment Plan for the TIF District and from the Cook County Assessors Office. Identify any parcels that are not located within the TIF District.
- 7) Table of Residential Unit Mix – Provide a detailed overview of the residential units in the project. Details must include: number and type of unit (#beds and #baths), unit size (SF), construction cost per SF, base sales price, proposed write-down for affordable units, and total sales revenue projected.
- 8) Affordable Housing – Village Ordinance 05-16 identifies affordably priced housing as a priority in the Village. Applicants with residential and mixed use projects are encouraged to provide some units that are affordably priced. The base price of affordable units must include one on-site parking space. The layout, amenities, and base level of finish in affordable and market-rate units should be similar.

The for-sale units are to be priced within reach of households earning no more than 80% of Area Median Income (AMI). Rental units are to be priced to be affordable to households earning no more than 60% of AMI.

- 9) Project Timeline – A comprehensive project timeline is required. Include anticipated acquisition, start, and end dates as well as other project milestones. Details must be provided for each phase of a multi-phase project. This timeline should also identify any critical or time-sensitive dates as well as any time constraints that the Applicant is facing.
- 10) Redevelopment Goals and Objectives – Confirm that this project is consistent with the goals and objectives identified in the TIF Redevelopment Plan. Copies of the TIF Redevelopment Plans are available at Village Hall.
- 11) Public Benefits – Fully describe the public benefits that will be realized after completion of this project. Projects with a high degree of public benefits are more likely to receive TIF assistance. Examples of public benefits include, but are not limited to the following:
 - Creation of senior and/or affordable housing
 - Creation of new commercial choices
 - Re-occupancy of vacant building
 - Catalyst for new private investment
 - Elimination of blighting conditions
 - Increase in sales tax revenue
 - Increase in property tax revenue
 - Creation of new permanent jobs

This statement should include qualitative examples of public benefits as well as quantifiable and measurable outcomes of the short-term and long-term benefits to the Village.

- 12) Residential Displacement – Identify the number of residents, if any, who have been displaced and/or will be displaced as a direct result of this project. If any residents are to be displaced, this statement must indicate whether any of these residents are from “low” or “very low” income households. The Illinois Affordable Housing Act establishes definitions for “low” and “very-low” income households. The Applicant must address options available for the re-housing of these displaced residents.
- 13) Demonstration of Need – Provide a detailed statement that accurately and completely explains why TIF assistance is needed. State law only allows TIF funds to be awarded to projects that would not occur “but for” the public contribution. This statement must provide the Village with sufficient information to verify the “but for” criteria.

Project Financial Information

- 14) Sources and Uses of Funds – Identify the Sources of funds used to finance the project. Typical sources include equity, lender financing, mezzanine financing, government financing, other anticipated types of public subsidy and any other types or methods of financing. Be aware that TIF assistance is available only as a reimbursement after the project is complete. Thus, the project budget must identify the up-front sources intended to finance the development costs of the project. If determined, specify the specific line items of the project budget that each source will finance.

Also identify the Uses of funds. General categories to be identified include: Acquisition and related site costs, hard construction costs, and a breakdown of soft costs.

If available provide an expected construction payout schedule.

- 15) Development Budget – Provide an accurate and concise development budget for the project. Budget must include a detailed breakdown of significant line item costs. The budget should be arranged to identify acquisition and site related costs, hard costs, and soft costs.

Identify all line items that are performed by the developer, owner, or related entities.

- 16) Request Amount of Assistance – Specifically state the amount of TIF assistance that is necessary to make this project viable.
- 17) Budget of TIF Eligible Expenses – Identify which of the development budget costs are eligible for reimbursement as allowed by the Illinois TIF Act. A summary of eligible costs is attached for reference.
- 18) Pro Forma Income and Expense Schedule – Commercial and rental housing projects must submit pro formas that identify income and expense projections on a quarterly basis for a ten-year period. A (hypothetical) property reversion is to be assumed at the end of the ten-year period. Clearly identify all assumptions (such as absorption, vacancies, debt service, operational costs etc.) that serve as the basis for the pro formas. Two sets of pro formas are to be submitted. The first is to reflect the project without TIF assistance and the second with TIF assistance.

For-sale housing developments must submit similar pro formas that reflect the project income and expenses with and without TIF assistance. Clearly identify all assumptions (such as absorption, sales prices, taxes, etc.) Identify the profit expected at the completion of the project.

- 19) Increment Projections – Include projections of the incremental taxes that will be generated by this project for the remaining life of the TIF District. Clearly identify all assumptions considered in these projections.

When Village staff reviews these projections, the following assumptions are typically considered. Provide a concise explanation if your assumptions differ.

- Base EAV as published in the TIF Redevelopment Plan
- Full reassessment of project occurs at least 1-year after project completion (may be distributed for phased projects)
- Triennial tax reassessment increase of 6% (2% per year)
- Current year tax rate anticipated for all future years
- 95% collection rate
- 10% of project increment retained for staff administration of TIF plans
- NPV calculated at three reasonable discount rates

- 20) Internal Rate of Return - All commercial and residential projects must submit an internal rate of return analysis on equity assuming a five and ten-year holding period. Two analyses must be submitted. One without TIF assistance and the second with TIF assistance.

- 21) Profitability Calculations – Provide calculations that identify the anticipated profitability to the developer, owner, and related entities at the completion of the project. These calculations must consider profitability measured in the following ways.

- Return on equity (total)
- Return on equity (annual)
- Percentage of total development costs

If there is a relationship between the general contractor and the developer, the profit component of the general contract will be included as part of the developer's profit. Similarly, if there is a relationship between the developer and the project managers, development managers, sales agents, marketing, or other associates of the project, the profit component of those line item costs will also be included in the developer's profit.

- 22) TIF Performance Measures – Identify the performance outcomes of the requested TIF assistance. Actual performance will vary from project to project. Typical performance measures of TIF assistance include:

- TIF assistance as percentage of total project costs
- TIF assistance as percentage of increment generated by project
- Ratio of Public (TIF) to Private investment
- TIF assistance per FTE job created or retained

- 23) Financial Commitments – Submit commitment letters from all lenders for proposed debt (such as construction, permanent, and government financing) and all other financial sources of the project (such as grants, and tax credits). Commitment letters must clearly specify the nature and terms of the obligations.
- 24) Evidence of Site Control – Submit documents to verify that the developer has control of the project site. Acceptable documentation may include deeds, title policies, leases, options, and real estate sales contracts. If the property is yet to be acquired in a manner other than a private real estate transaction, provide a statement regarding the method of acquisition, status and next steps of the related processes.
- 25) Most Recent Property Tax Bills – Submit a copy of the most recent second installment property tax bill for each PIN.
- 26) Appeal of Property Taxes – Provide a statement, signed by the developer/owner, that the property has not received a Cook County real estate tax reduction and that such a reduction has not and will not be requested for the remaining life of the TIF District.

Professional Studies

- 27) Market Studies - Applications for commercial and residential projects must include a comprehensive market study. Market study must identify target markets, analysis of competition, demographics, market rents, letters of intent/interest from prospective tenants, or for housing developments sales prices or rental rates of comparable properties.
- 28) Appraisal – All projects that involve the transfer of land must include a current appraisal that is no more than 6 months old. Projects that include land as a form of equity or collateral must also submit a current appraisal. All appraisals must be performed by a certified MAI or bank approved appraiser. The initial appraisal may need to be updated or amended to adjust for material issues such as inappropriate comparables and changes in the marketplace occurring between time of application and time needed for obtaining needed approvals.
- 29) Environmental Studies and Reports – Submit a copy of the Phase I environmental report/study performed on the property. If there is probable or potential contamination on the project site, then a Phase II report/study or evidence that the site has been, or is being enrolled in an IEPA No Further Remediation Program must also be included.
- 30) Schools Impact Study – Submit the estimated number of school-aged children reasonably anticipated to be generated by the project. The rationale behind the estimate must be clearly explained and should include actual figures from comparable projects, when available.

Developer Information

- 31) Ownership Structure – Submit a flow chart or narrative description of the ownership structure of the development and ownership entities. The financial relationship of each entity must be clearly and accurately described. Where applicable, also identify the relationship between the developer/owner and the operating entity.

Developer Information, continued

- 32) Financial Statements - Provide year-end historical (prior 3 years) and interim financial statements of the Applicant and owning and / or operating entity if different from the Applicant. Financial Statements should include accountant audited or compiled Balance Sheet, Income Statement and Statement of Cash Flows.
- 33) Resumes and Experience of Principals – Submit resumes for each of the principals of the developer, owner, and operator. Also include a brief history that identifies the development entities past experience and involvement in developing similar projects and the ownership or operating entity's past experience or ability in managing similar projects.
- 34) Letter of Application – All TIF applications submitted by a consultant or other representative, must include a letter from the developer / owner that attests to the authority of the consultant to submit project information on behalf of the developer / owner. The letter must also acknowledge the developer's / owner's knowledge of the application contents and the accuracy of the information submitted.

Compliance Information

- 35) Prevailing Wage Requirements – The owner / developer must declare knowledge and acceptance of Illinois Prevailing Wage requirements that are applicable to all projects that receive TIF assistance.
- 36) Payment of Outstanding Debts – The principals, management team, and significant investors for the project must not have any outstanding debts to the Village. All outstanding village debts must be paid in full in order for the Village to process the application for TIF assistance.

Escrow Funding

- 37) A deposit of \$2,000 is required to be submitted at the time of application. These funds will be used for all staff time associated with the review of the request and any out-of-pocket costs incurred by the Village that are directly related to the TIF request. Such costs could include but are not limited to third party consultants, legal costs, processing costs such as legal notice and postage for public hearing, and court reporting fees if necessary.

Any unused funds will be refunded back to the applicant. Should the nature of the application be unusually complex or require significant processing time, additional funds may be required to cover Village costs. Final action by the Board of Trustees shall be delayed until all escrow funds are paid in full.

Typical TIF-Eligible Costs for Private Redevelopment Projects	Type of Project (Notes 1 and 2)					
	Existing Building Rehabilitation			New Construction		
	Commercial or Industrial	Residential		Commercial or Industrial	Residential	
		Market- Rate & Affordable	Low & Very- Low Income		Market- Rate & Affordable	Low & Very- Low Income
1. Property assembly costs including acquisition of real property, rights or other interests	X	X	X	X	X	X
2. Relocation costs as determined appropriate by the Village	X	X	X	X	X	X
3. Site preparation costs including: (a) demolition, clearing and grading (b) environmental remediation (c) site improvements (such as concrete or asphalt) that serve as an engineered barrier for environmental contamination	X	X	X	X	X	X
4. Hard construction costs of base building or leasehold improvements	X	X	X	Not Applicable		50% Note 3
5. Professional fees directly related to redevelopment of the site (including architectural, civil engineering, legal, planning and environmental fees)	X	X	X	X	X	X
6. Professional fees directly related to construction or rehabilitation of the building (including architectural, engineering, legal and financial fees)	X	X	X	Not Applicable		X
7. Marketing sites for redevelopment	Not Applicable			Not Applicable		
8. Annual interest costs related to construction, renovation, or rehabilitation	30%	30%	75% Note 3	30%	30%	75% Note 3
9. Job training and retraining costs implemented by businesses located within the TIF District	X	Not Applicable		X	Not Applicable	

Note 1 - Based on Tax Increment Allocation Redevelopment Act of the State of Illinois, 65 ILCS 5/11-74.1 et seq.

Note 2 - Each occupancy component of a mixed use project is permitted to use the eligible costs applicable to its specific use and occupancy.

Note 3 - The 75% annual interest and the 50% hard construction costs of low and very-low income housing are NOT permitted to be used simultaneously.

Budget of Project Expenses

Project Name: Sample Redevelopment Project
Project Address: 1234 Sample St.
Morton Grove, IL

Project Expenses		Amount
1	Site Related Costs – provide a line item break down of the project costs related to the site, include acquisition, demolition, site preparation, remediation, and other related costs	\$0
2	Hard Costs – provide a line item break down of the hard costs of construction	\$0
3	Soft Costs – provide a line item break down of all soft costs, including professional fees, developer and management fees, financing costs, marketing and other soft costs	\$0
	Total Development Costs	\$0

FOR EXAMPLE ONLY

Budget of TIF-Eligible Expenses

Project Name: Sample Redevelopment Project
Project Address: 1234 Sample St.
Morton Grove, IL

TIF-Eligible Expenses		Amount	
1	Architectural Fees		\$0
2	Engineering Fees		\$0
3	Legal Fees		\$0
4	Environmental Reports and Surveys		\$0
5	Other professional fees		\$0
6	Interest costs related to rehabilitation of existing building, or	30%	\$0
7	Interest costs related to rehabilitation or new construction of housing for low- and very-low income households (Note 1)	75%	\$0
8	Site acquisition and assembly		\$0
9	Relocation costs		\$0
10	Environmental Remediation		\$0
11	Demolition		\$0
12	Site preparation		\$0
13	Engineering barriers		\$0
14	Hard construction costs of building rehabilitation		\$0
15	Hard construction costs of low- and very-low income housing units (Note 1)	50%	\$0
Total of TIF-Eligible Expenses			\$0

Note 1 - Line items 7 and 15 are NOT permitted to be used simultaneously.

Note 2 - TIF-Eligible expenses must comply with the Tax Increment Allocation Redevelopment Act of the State of Illinois, 65 ILCS 5/11-74.1 et seq.

FOR EXAMPLE ONLY



Village of Morton Grove TIF Application Checklist

Include this Checklist when submitting your application for TIF Assistance. If any of the required items are omitted from the application, please provide a brief explanation.

General Project Information

- ☐ One-Page Summary
- ☐ Contact Information
- ☐ Project Narrative
- ☐ Site Map(s)
- ☐ Renderings of Project
- ☐ List of PINs
- ☐ Affordable Housing
- ☐ Table of Residential Unit Mix
- ☐ Project Timeline
- ☐ Redevelopment Goals and Objectives
- ☐ Public Benefits
- ☐ Residential Displacement
- ☐ Demonstration of Need

Project Financial Information

- ☐ Sources and Uses of Funds
- ☐ Development Budget
- ☐ Request Amount of Assistance
- ☐ Budget of TIF Eligible Expenses
- ☐ Pro Forma Income and Expense Schedule
- ☐ Increment Projections
- ☐ Internal Rate of Return

- ☐ Profitability Calculations
- ☐ TIF Performance Measures
- ☐ Financial Commitments
- ☐ Evidence of Site Control
- ☐ Most Recent Property Tax Bills
- ☐ Appeal of Property Taxes

Professional Studies

- ☐ Market Studies
- ☐ Appraisal
- ☐ Environmental Studies and Reports
- ☐ Schools Impact Study

Developer Information

- ☐ Ownership Structure
- ☐ Financial Statements
- ☐ Resumes and Experience of Principals
- ☐ Letter of Application

Compliance Information

- ☐ Prevailing Wage Requirements

Other

- ☐ Escrow Funding