City of Cleveland: LGBT-Owned Business Registry
How To Guide
How To Guide

The City of Cleveland is one of the few cities in the United States to host a LGBT-Owned Business Registry.

Plexus invites any businesses based in Cuyahoga, Geauga, Lake, Lorain, Medina, Portage or Summit counties that are 51% or more owned by LGBT individual(s) to register online. These counties comprise what is called “The Cleveland Contracting Market”. This guide provides essential information to help you successfully submit an application.

* Please use this guide as a tutorial after reviewing the informational packet *

Plexus is happy to assist you along the way. Don’t hesitate to contact us to complete your application. For assistance or questions, contact:

David Robinson
info@thinkplexus.org
888-753-9879

For questions after you submit your application pertaining to the status, contact the City of Cleveland’s Office of Equal Opportunity.

Office of Equal Opportunity
Phone: 216-664-4152
Fax: 216-664-3870

REGISTER AT:
CLEVELAND.DIVERSITYCOMPLIANCE.COM
Document Checklist

The City of Cleveland has two sets of document lists that are needed to submit your application:

**Mandatory Documents** must be submitted in order to process your application. **Required Documents** are only needed *when applicable* to your business.

### Mandatory Documents
- Affidavit of Registration (LGBT)
- Driver’s License or Passport
- Federal Tax Returns

### Required Documents
- Business Cards and/or Company Brochure
- NGLCC Certificate
- Liability Insurance Certificate
- Worker’s Compensation Certificate
- List of Owned and/or Leased Equipment
- Past Contracts and/or Purchase Orders
- Articles of Incorporation (Ownership documents, State Certificates, etc.)
- Share Ledger and/or Stock Certificates
- Proof of Stock Purchase
- Special Licenses Obtained
- Distributor Agreements
- Equipment Lease or Rental Agreement
- Birth Certificate of each Owner
- Resume of all Principal Officers

### Documents Supporting LGBT Status

**NOTE:** you need to provide enough documentation to attest to your LGBT status (these are NOT all required.) If the business is NGLCC Certified, NONE of these documents are required.

- Certified Copy of Domestic Partnership, Civil Union or Marriage Certificate
- Proof of Domestic Partnership Health Insurance
- Proof of Joint Property Ownership
- Documentation of Petition for Hospital Visitation Rights
- Legal Petition Name Change
- Letters from two Personal References attesting to LGBT Status
- Letter from Recognized LGBT Organization attesting to LGBT Status
- Letter from Physician attesting to LGBT Status
- Certificates/Awards/Honors of the Business and/or Owners as a Member of the LGBT Community.
Creating an Account

Before you can begin your application, you must create an account to login to the City of Cleveland Certification and Compliance Reporting System.

What you Need

- Tax ID
- Business Information (such as business name, DBA information, company type)
- Business Contact Information (email, phone, address)
- Company Contact Person (point person, their title, email, phone)

Steps to Create an Account

1. Go to: https://cleveland.diversitycompliance.com
2. Select “Apply for CSB/MBE/FBE/Section 3 Certification and LGBTBE Registration”

The next screen gives three options to process your application.

Option 1: Recertification - this is only relevant if you are renewing your LGBT registry certificate OR you have registered with the City in another form (i.e. female owned business) AND you remember your login information

Option 2: Recertification - this is only relevant if you are renewing your LGBT registry certificate OR you have registered with the City in another form (i.e. female owned business) AND you DO NOT know your login information.

Option 3: New Certificate - this is the option for all businesses that have never used the City of Cleveland’s Certification and Compliance Reporting System
3. Select “Create an Account”

NOTE: For anyone selecting Option 1 or Option 2, please login to your account or retrieve your old login information and proceed to the “Processing your Application” section of this guide.

4. On the next screen, complete the 4 sections that include Tax ID, Business Information, Business Contact Information, and Company Contact Person.

5. Select “Next”.

NOTE: The system will recognize if the Tax ID has been used on the City website before. If this is the case, it will give you the option to request new login information.
6. Review the information you submitted. Select “Edit” if any changes need to be made.

7. Checkmark the box “I would like to create an account in this system.”

8. Select “Next.”

After selecting “Next” you will automatically get redirected to the dashboard for the City of Cleveland’s Certification and Compliance Reporting System. If you already had a login established, this is the primary screen you see after logging into the system.
The User Dashboard is the primary screen each user sees after logging into the system.

If you selected Option 1 or Option 2, and logged into the system instead of creating an account, this is the screen you will see.

1. Select “Renew/Apply for Certification.”

The next screen covers Qualifications and Definitions before applying.

**NOTE:** For the LGBT registry, the only two qualifications are having an office in the City of Cleveland Buying Market and being at least 51% owned by a LGBT individual(s).
Steps to Processing your Application

2. In the “Select an Option” box select “Your firm is not currently certified by the City of Cleveland.”

Select an Option

- Your firm is currently certified by the City of Cleveland.
- Your firm is not currently certified by the City of Cleveland.

3. Select “Your firm has a physical presence in the Cleveland Contracting Market.”

Select an Option

- Your firm is currently certified by the City of Cleveland.
- Your firm is not currently certified by the City of Cleveland.
- Your firm has a physical presence (office) in the Cleveland Contracting Market. The Cleveland Contracting Market is defined as the following counties: Cuyahoga, Geauga, Lake, Lorain, Medina, Portage, and Summit.
- Your firm is not located in the Cleveland area.

4. Select “Your firm is seeking LGBTBE registration.”

Select an Option

- Your firm is currently certified by the City of Cleveland.
- Your firm is not currently certified by the City of Cleveland.
- Your firm has a physical presence (office) in the Cleveland Contracting Market. The Cleveland Contracting Market is defined as the following counties: Cuyahoga, Geauga, Lake, Lorain, Medina, Portage, and Summit.
- Your firm is seeking CSR/MBE/EBE/LP/SURE certification
- Your firm is seeking to participate in the Storefront Renovation Program (SRP)
- Your firm is located in Cuyahoga County and seeking Section 3 certification
- Your firm is seeking LGBTBE registration.
- Your firm is not located in the Cleveland area.
Steps to Processing your Application

5. Select “Submit an LGBTBE Registration Application.”

Select an Option

- Your firm is currently certified by the City of Cleveland.
- Your firm is not currently certified by the City of Cleveland.
- Your firm has a physical presence (office) in the Cleveland Contracting Market.
  The Cleveland Contracting Market is defined as the following counties: Cuyahoga, Geauga, Lake, Lorain, Medina, Portage, and Summit, above.
- Your firm is seeking OSB/MBE/FBE/PE/SUE certification
- Your firm is seeking to participate in the Storefront Renovation Program (SRP)
- Your firm is located in Cuyahoga County and seeking Section 3 certification.
- Your firm is seeking LGBTBE registration
  » Submit an LGBTBE Registration application.
- Your firm is not located in the Cleveland area.
Steps to Processing your Application

You are now on the eligibility requirements before submitting your application. Your email address and company type is auto populated from your previous information.

6. Review the information and make sure your email address and company type is correct.
7. Select the radio button for “Application Auto-Fill” (even if you haven’t applied before)
8. Select the radio button for “Yes” under eligibility, confirming the owner is a U.S. Citizen and the business is a for-profit organization.
9. Select “Continue.”
The next screen is acknowledgment of the Mandatory and Required Documents that are listed on page 2 of this guide.

10. Select the box called “**Check this box and click Continue to start the application process.**”

11. Select “**Continue**.”
The Application Summary Screen

The application summary screen is the primary screen used to submit information regarding the LGBTBE registry application. Applications can take 30 to 90 minutes to complete based on the complexity of your business.

There are four total sections for the City of Cleveland LGBT Owned Business Registry. Three of them include typed sections, while the forth is just uploading the mandatory and required documents. The written (or typed) sections include: Company Profile, Ownership & Control, and Operations.

Steps to Processing your Application

12. Select the first “Process” button to enter into the Company Profile section.
Section 1: Company Profile

This section contains basic information including Business Name, DBA Name, Location, Contact Information, Website and Business Description.

What you Need

- Federal Employer ID Number (or SSN)
- Date Business was Established
- Date of Incorporate
- Gross Revenue for the Past Three Years

Steps to Processing your Application

13. Completed the required and optional information. If something is required, that you cannot provide, type something into the box so that the system allows your to continue processing your application.

14. Select “Save & Return to Application Summary.”

15. Select the second “Process” button to enter into the Ownership & Control section.

Section 2: Ownership & Control

This section speaks to who owns and operates the business. What the application is determining in this section is if your business is in fact owned and operated by a LGBT individual(s) at 51% or above.

What you Need

- Identity of those who hold 5% of the firm’s ownership (Be ready to include % of ownership, date of ownership home address and salary of each)
- Number of shares authorized and information on voting shares (only if applicable)
- Investments, cash, equipment made to start the business and who contributed them
- Identity of those making day-to-day decisions. This question is broken down into basic business components: hiring/firing, financial decisions, marketing & sales, purchasing, supervision, etc. (Be ready to include any individual at your company responsible, their job title, their sexual orientation (if known) and gender.)
System Tip

In this section of the application, the system will allow you to auto populate information for the questions pertaining to day-to-day management and decision making.

Select this option if the remaining areas of business management pertain to same the individual.

Steps to Processing Your Application

16. Completed the required and optional information. If something is required, that you cannot provide, type something into the box so that the system allows your to continue processing your application.

17. Select “Save & Return to Application Summary.”

18. Select the third “Process” button to enter into the Operation section.

Section 3: Operations

This section is the shortest section of the application and is seeking information to determine the business is functioning.

What you Need

- List real property that is either owned/leased by the business
- List the 6 largest contracts completed by your firm over three years (not all 6 are required)
- List principal suppliers
- List any storage or warehouse information for stock or supplies
Steps to Processing your Application

19. Completed the required and optional information. If something is required, that you cannot provide, type something into the box so that the system allows your to continue processing your application.

20. Select “Save & Return to Application Summary.”

21. Select the fourth “Process” button to enter into the Document List section.

Section 4: Document Submission

This section allows you to submit your documents found on the document checklist (page 2 of this how to guide) electronically. The section is broken down into mandatory and required documents. Any mandatory document not uploaded will not allow of final application submission.

NOTE: Required documents may not be eligible to your organization. For those documents, Not Applicable is an option.

NOTE: You do not need to upload documents to provide proof of LGBT status if NGLCC Certified. Not all documents pertaining to LGBT status are required, provide as many as you have or until you believe you’ve satisfied the requirement.

Steps to Processing your Application

22. Attach each Mandatory Document using the “Attach” button. That button will prompt a pop-up box to upload that specific document.

Use the “Refresh List” button if you submitted an upload that is not showing.
23. Upload as many required documents as you deem necessary to your business.

24. Select the radio button in the “Mark as Not Applicable” column for any document you cannot procure or is not relevant to your business.

25. Select the “Lock In” button after you’ve either uploaded a document OR marked it as “Not Applicable”.

26. Select the “Return” button to go back to the Application Summary Screen.
The final process includes signing your application and submitting it for approval. If your application IS NOT complete, you will not be able to access the signature tab.

Steps to Signing your Application

27. Select the “Sign” button on the Application Summary Screen.
28. The next screen will allow you to enter your Name, Title, Business Name and Date.
29. Select the checkmark indicating acknowledgement.

30. Select the “Sign Application” button.

Steps to Submitting your Application

31. On the Application Summary Screen, select the “Submit” button.

You will receive a confirmation that your application has been submitted.
Below is an example of a submitted application. Each area will display a green checkmark. You will also receive an email notification of your application submission. You can also select “View and Print App For Your Records” to retain a PDF version or print a version of your completed application.

The application review has been completed.

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<th>Application Information</th>
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<td>Application Type</td>
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<td>Business Name</td>
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<td>Current Status</td>
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<td>Contact Person</td>
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<th>Sections and Documentation</th>
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<td>Company Profile</td>
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<td>Ownership &amp; Control</td>
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<td>Operations</td>
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<td>Document List</td>
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Next Steps

Application Review can take weeks to complete. You will receive notice via email once your application is submitted. The City of Cleveland is very helpful about completing the process. If they need clarification or further information, they will contact you by submitting a ‘QUESTION’ on the system which generates an email to you. Retain your login information so you can enter the application system and answer any follow ups required by the City.

You can check your status by logging on to the system at anytime. Once your application is approved, you will receive a certificate from the City of Cleveland via mail.