

LEGISLATIVE #

110259H



HISTORIC PROPERTY GRANT AND REVOLVING LOAN PROGRAM

SUMMARY

The Historic Property Grant and Revolving Loan Program has been established by the Tallahassee City Commission as an incentive to provide financial assistance to restore/rehabilitate eligible historic structures. The purpose of the program is to promote broader use and appreciation of Tallahassee's historic areas by its citizens and visitors through a more active mix of residential, cultural, retail, and restaurant uses in the historic districts.

Based upon available appropriations, it is the intent of the City to accept project applications at any time during the year. The Historic Property Grant and Revolving Loan Finance Committee will review applications on an as needed basis. The Chairman of the Committee has the authority to call special meetings as circumstances dictate.

The Committee has the authority to approve funding for projects in amounts up to and including \$10,000. Projects in excess of \$10,000 will be forwarded with a recommendation from the Committee to the City Commission for funding approval. However, the release of City funds for approved projects is subject to the receipt of either a Certificate of Appropriateness (COA) from the Tallahassee-Leon County Architectural Review Board (ARB) or a Certificate of Minor Review (CMR) from ARB staff. A COA or CMR must be obtained before the project is reviewed by the Finance Committee.

Staff of the Economic Development Department, in conjunction with the Chairman of the Committee, shall have the authority to grant a subsequent request for additional funds up to 10% of any approved request, but not more than \$10,000, provided that the total request inclusive of any additional funding remains within the program parameters as determined herein.

HISTORIC PROPERTY GRANT AND LOAN FINANCE COMMITTEE

The Historic Preservation Grant and Loan Program Finance Committee was established by the City Commission to review and make recommendations on applications submitted for funding under the program. The Committee also has the responsibility of developing and updating implementation regulations for the program based on Commission policy.

The membership of the Committee consists of representatives from the Treasurer-Clerk's Office, the Department of Management and Administration, the Real Estate Office, the Tallahassee Trust for Historic Preservation, Inc., and three representatives from local financial institutions. The Committee is staffed by the Economic Development Department.

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Telephone (850) 891-8886 • Fax (850) 891-2051 • TDD 1-800/955-8771**

GENERAL GRANT AND REVOLVING LOAN ELIGIBILITY CRITERIA

- Properties must be listed on the Local Register of Historic Places and be subject to the Historic Preservation Overlay (HPO).
- State owned historic properties are excluded.
- No new construction is eligible for program funds.
- Property land use must be consistent with the City of Tallahassee Downtown Plan, the Tallahassee-Leon County 2010 Comprehensive Plan, and the Tallahassee Zoning Site Plan Review Codes.
- Project restoration/rehabilitation is subject to site plan and architectural review criteria. Contact the Historic Preservation Officer at 488-7100 for more information.
- Properties must be free from any judgment liens and all mortgage and tax obligations must be current.
- There may be no more than one application for project funding for a property per fiscal year. "Project" is defined as a single renovation activity or a set of renovation activities for an eligible property. Any subsequent applications for the same property in future years will be treated cumulatively for purposes of determining the percentage of grant versus loan and/or applicant funding.

GRANT AND REVOLVING LOAN FUND USE RULES

Historic property funds can be used for one or all of the following purposes:

1. Stabilization for the purpose of restoration/rehabilitation;
2. Structural repair;
3. Facade restoration/rehabilitation;
4. Compliance improvements for fire/building/commercial/handicap and other code and health/safety requirements; and
5. Other construction activity that will result in a "total" restoration/rehabilitation of the building.

Funds cannot be used for routine maintenance activities that are a part of normal property ownership, including the repair or replacement of non-historic roofs, unless those activities are part of a "total" restoration/rehabilitation as referenced in paragraph 5, above, as determined by a case-by-case review.

If any of the above elements involve energy related improvements, it will be necessary to submit a City energy audit with the application documents. Contact the City Energy's Office at 891-0020.

ELIGIBLE PROJECT TYPES BY TIER

Projects eligible under this program fall in one of three tiers:

- Tier 1 - residential use
- Tier 2 - cultural, retail, restaurant use
- Tier 3 - other

The tiers represent the preference level for various types of projects in descending order, which is reflective of the historic preservation goals contained in the City of Tallahassee Downtown Plan.

FUNDING AMOUNT RULES

Funding will be awarded for projects in the form of both grants and/or loans. The type of funding and the amount of funding are described below for each type of project as categorized by tier. See attached charts that summarize this information.

A. Tier 1 - Residential Use

- This tier will apply to all residential properties and to residential portions of eligible mixed-use properties. Single-family residences converted to function, as a bed and breakfast inn, which is owner-occupied with five or fewer guest rooms, shall be considered a residential property. Consistent with the City's Zoning Code, bed and breakfast inns in the Historic Overlay District are limited to five or fewer guest rooms.
- Residential funding will be based solely on the need of the property, not the financial need of the owner.
- Tier 1 funding will be structured as follows:
 - The first \$10,000 of project costs would be 100% funded by a City grant.
 - The next increment of project cost in excess of \$10,000 to \$30,000 would be funded by a 50% City grant (up to a maximum of \$10,000 in additional City grant money), with the applicant's portion being either in cash or a City loan, at the applicant's discretion subject to approval by the City.
 - The next increment of project cost in excess of \$30,000 to \$100,000 would be funded by a 30% City grant (up to a maximum of \$21,000 in additional City grant money), with the applicant's portion being either in cash or a City loan, at the applicant's discretion subject to approval by the City.
 - The final increment of project cost in excess of \$100,000 would be 100% funded by either applicant's cash or a City loan, at the applicant's discretion subject to approval by the City.
 - The maximum allowable City grant for a project in this tier is \$41,000. There is no maximum allowable City loan in this tier.

B. Tier 2 - Cultural, Retail, and Restaurant Use

- This tier will apply to all cultural, retail, transient lodgings (other than bed and breakfast inns), and restaurant uses and to cultural, retail, transient lodging (other than bed and breakfast inns), and restaurant use portions of eligible mixed-use properties.
- Cultural, retail, transient lodging (other than bed and breakfast inns), and restaurant use funding will be based on the financial capacity of the applicant and/or project.

- If the requested grant loan or combination grant, and loan amount is \$20,000 or greater for a Tier 2 or 3 type project, the project will be required to undergo an independent financial analysis by city staff or by a financial institution under contract to the City. Instructions on how to accomplish this will be provided by the Economic Development Department once the Historic Property Grant and Loan Finance Committee determines the project is eligible under the rules. The cost of an independent financial analysis is an eligible expense under the program.
- Tier 2 funding will be structured as follows:
 - The first \$25,000 of project cost would be funded by a 70% City grant (up to a maximum of \$17,500 in City grant money), with the applicant's portion being either in cash or a City loan, at the applicant's discretion subject to approval by the City.
 - The next increment of project cost in excess of \$25,000 to \$50,000 would be funded by a 50% City grant (up to a maximum of \$12,500 in additional City grant money), with the applicant's portion being either in cash or a City loan, at the applicant's discretion subject to approval by the City.
 - The next increment of project cost in excess of \$50,000 to \$100,000 would be funded by a 22% City grant (up to a maximum of \$11,000 in additional City grant money), with the applicant's portion being either in cash or a City loan, at the applicant's discretion subject to approval by the City.
 - The final increment of project cost in excess of \$100,000 would be 100% funded by either applicant's cash or a City loan, at the applicant's discretion subject to approval by the City.
 - The maximum allowable City grant for a project in this tier is \$41,000. There is no maximum allowable City loan in this tier.

C. Tier 3 - Other

- Other uses, such as office, will be funded based on the financial capacity of the applicant and/or project.
- If the requested grant loan or combination grant, and loan amount is \$20,000 or greater for a Tier 2 or 3 type project, the project will be required to undergo an independent financial analysis by city staff or by a financial institution under contract to the City. Instructions on how to accomplish this will be provided by the Economic Development Department once the Historic Property Grant and Loan Finance Committee determines the project is eligible under the rules. The cost of an independent financial analysis is an eligible expense under the program.
- Tier 3 funding will be structured the same as Tier 2 funding which is as follows:
 - The first \$25,000 of project cost would be funded by a 70% City grant (up to a maximum of \$17,500 in City grant money), with the applicant's portion being either in cash or a City loan, at the applicant's discretion subject to approval by the City.

- The next increment of project cost in excess of \$25,000 to \$50,000 would be funded by a 50% City grant (up to a maximum of \$12,500 in additional City grant money), with the applicant's portion being either in cash or a City loan, at the applicant's discretion subject to approval by the City.
- The next increment of project cost in excess of \$50,000 to \$100,000 would be funded by a 22% City grant (up to a maximum of \$11,000 in additional City grant money), with the applicant's portion being either in cash or a City loan, at the applicant's discretion subject to approval by the City.
- The final increment of project cost in excess of \$100,000 would be 100% funded by either applicant's cash or a City loan, at the applicant's discretion subject to approval by the City.
- The maximum allowable City grant for a project in this tier is \$41,000. There is no maximum allowable City loan in this tier.

D. Supplemental Funds for Exceptional Cases

- Supplemental funding is only available to properties located within the Park Avenue and Calhoun Street Special Character Districts listed on the Local Register of Historic Places and subject to the Historic Preservation Overlay (HPO).
- In order to encourage Historic Property Owners to make an on-going commitment to the preservation of their property, the maximum grant amount \$41,000, will be increased by the amount the projected basis exceeds the projected appraised value of the property. Projected basis of the property is defined as the original cost of the property plus prior improvements to the property plus the projected improvements to the property.
- To be included in the basis, the improvements must have been made to enhance the historic preservation of the property in accordance with the purposes described in the "Grant and Revolving Loan Fund Use" section of the rules (page 2).
- In order to receive this additional grant funding, the applicant must provide documentation of the original cost of the property and any prior improvements; in addition, an appraisal of the projected value of the property, performed by a MAI certified appraiser as pre-qualified by the City of Tallahassee Real Estate Division, must be included in the application. The expense of the appraisal is an eligible cost for reimbursement under the grant.
- The maximum total amount of allowable grant, including the additional amount as calculated under this provision, shall be the lesser of \$125,000 or 50% of the projected appraised value of the property.

E. Funding Request Documentation

Applicants will be required to submit in the application for funding under this program quotes from three (3) licensed contractors. The funding awarded will be based on the lowest qualified bid (qualified defined as taking into consideration the historic nature of the structure and following the Secretary of Interior's Standards for Rehabilitation and Rules for Rehabilitating Historic Buildings). The owner may elect to choose a contractor other than the one with the lowest qualified bid but shall be responsible for all costs exceeding the lowest qualified bid. In all cases, the contractor must be

licensed, insured, and have worker's compensation. The Historic Property Grant and Loan Finance Committee may grant an exception to the requirement to provide three quotes on a case-by-case basis where there is a sole source or limited number of qualified providers.

FUNDING SET-ASIDES BY TIER

- 35% of remaining and future grant and loan program funds will be set aside for residential funding (Tier 1 projects).
- 65% of remaining and future grant and loan program funds will be set aside for cultural, retail, and restaurant uses (Tier 2 projects).
- There shall be no initial set-aside for Tier 3 projects.
- If during an application cycle there are not sufficient qualified projects to fully utilize the Tier 1 set-aside, the balance in the Tier 1 set-aside would become available for Tier 2 projects.
- If during an application cycle there are not sufficient qualified projects to fully utilize the Tier 2 set-aside, the balance in the Tier 2 set-aside would become available for Tier 1 projects.
- If during an application cycle there are not sufficient qualified projects to fully utilize the Tier 1 and Tier 2 set-aside, the balance in the Tier 1 and Tier 2 set-aside would become available for Tier 3 projects.

LOAN STRUCTURE

- A maximum ten-year straight-line amortization with equal monthly principal payments will be used.
- The interest rate will be one-half of the prime rate at the time of loan approval.
- Interest during the construction phase will be capitalized, meaning that it will accrue as money is drawn for construction purposes and will be amortized into the loan.
- Principal and interest will be paid on a monthly basis beginning one month subsequent to receipt of a Certificate of Occupancy for the improved property.
- The transaction will be treated as a note upon preliminary approval and a loan at closing, following construction.
- The loan may be subordinate to other loan commitments made by the borrower, however, it may not be subsequently further subordinated after closing without the written approval of the Committee.
- The property may be sold during the loan period, however, should such occur, the remaining balance of the loan will either become due and payable or may transfer to the new owner, at the option of the owner.
- Should the character of the property change to something other than historical in nature during the loan period, the outstanding balance of the loan will become due and payable.

- Any loan (or grant and loan in combination) of more than \$10,000 will be secured by a mortgage. Prior to closing, the applicant shall provide the City with mortgage title insurance, the cost of which shall be paid by the applicant or deducted from the proceeds at the time of closing.
- Any loan (or grant and loan in combination) of \$10,000 or less is not required to be secured by a mortgage. Instead, a notice of historic grant and restrictive covenants will be filed with the Clerk of the Court. Prior to closing, however, the applicant shall provide the City with an ownership and encumbrance report, the cost of which shall be paid by the applicant or deducted from the proceeds at the time of closing.
- Prior to the City Commission considering any application, the Applicant will provide a credit report showing that the Applicant is financially stable. The cost of the credit report is an eligible expense under the program.
- Prior to the City Commission considering an application in excess of \$20,000 (includes grant and loan cumulative amounts), the City Attorney will contract for a title search to be performed on the subject property. The cost of the title search is an eligible expense under the program.
- A partner or officer must sign personally for the grant and/or loan in the case where the applicant is a corporation or a professional association. This does not apply to recognized non-profit organizations.
- The Notice of Commencement shall list as lender the City of Tallahassee, Economic Development Department, 300 South Adams Street, Tallahassee, FL 32301.

GRANT STRUCTURE

- All grants will be treated as ten year, zero interest, deferred loans.
- The amount of the deferred loan will be amortized in monthly installments over a ten year period beginning one month subsequent to receipt of a Certificate of Occupancy for the improved property.
- The monthly installments will be automatically forgiven (without any action by the City) as they become due as long as the character of the property remains historical in nature. Should the character of the property change to something other than historical in nature during the deferred loan period, the outstanding balance of the deferred loan will become due and payable.
- The deferred loan may be subordinate to other loan commitments made by the borrower, however, it may not be subsequently further subordinated after closing without the written approval of the Committee.
- The property may be sold during the deferred loan period, however, should such occur, the remaining balance of the deferred loan will either become due and payable or may transfer to the new owner, at the option of the owner.
- Should the character of the property change to something other than historical in nature during the deferred loan period, the outstanding balance of the deferred loan will become due and payable.

- Any deferred loan (or deferred loan and loan in combination) of more than \$10,000 will be secured by a mortgage. Prior to closing, the applicant shall provide the City with mortgage title insurance, the cost of which shall be paid by the applicant or deducted from the proceeds at the time of closing.
- Any deferred loan (or deferred loan and loan in combination) of \$10,000 or less is not required to be secured by a mortgage. Instead, a notice of historic grant and restrictive covenants will be filed with the Clerk of the Court. Prior to closing, however, the applicant shall provide the City with an ownership and encumbrance report, the cost of which shall be paid by the applicant or deducted from the proceeds at the time of closing.
- Prior to the City Commission considering any application, the Applicant will provide a credit report showing that the Applicant is financially stable. The cost of the credit report is an eligible expense under the program.
- Prior to the City Commission considering an application in excess of \$20,000 (includes grant and loan cumulative amounts), the City Attorney will contract for a title search to be performed on the subject property. The cost of the title search is an eligible expense under the program.
- A partner or officer must sign personally for the grant and/or loan in the case where the applicant is a corporation or a professional association. This does not apply to recognized non-profit organizations.

TOTAL PROJECT PRIORITY RANKING SYSTEM

Projects within each tier shall be evaluated based on a competitive total project ranking system, which ranks restoration/rehabilitation of eligible historic structures in the following order of priority:

1. Restoration/rehabilitation of an existing historic structure that is currently determined to be in fair to poor condition (criteria based definitions as defined by the State of Florida, Department of State, Division of Historical Resources application for "Historic Preservation Grants-In-Aid") and the historic structure must not have been comprehensively restored/rehabilitated within the last ten years.
2. The restoration/rehabilitation will serve as a catalyst for revitalizing a city block or area of the Special Character Districts in furtherance of the Downtown Plan, Objective 9.2 ("...by promoting broader use and appreciation of Tallahassee's historic areas by its citizens and visitors through a more active mix of cultural, retail, and restaurant uses in the historic structures...")
3. For Tier 2 and Tier 3 projects financial need should be demonstrated by documenting in the application that the project would only be financially feasible contingent upon receiving program funds.

IMPLEMENTATION REQUIREMENTS

1. All project work must be completed within eighteen months, unless an extension is approved by the Historic Property Grant and Loan Finance Committee. Should the project not be completed within eighteen months, and an extension not approved by the Committee, the loan and/or grant (deferred loan) shall be considered in default and subject to foreclosure.

- a. In order to draw down project funds for an approved project, applicants must submit an invoice that has been initialed by an authorized member of the City's Building Inspection staff who has inspected the work and approved it as complete. If there is a supervising architect engaged by the applicant, the architect can inspect the work and approve it as complete by initialing the invoices.
 - b. An amount equal to 25% of the authorized funds for an approved project will be held back from disbursement until a Certificate of Completeness is received from the Historic Preservation Officer.
2. The applicant shall be required to repay any amounts outstanding under a loan and/or grant (deferred loan) if there is any material damage to, or destruction of, all or a portion of the property. Provided, however, the applicant, in the event of such damage or destruction, shall not be considered in violation of this provision if it repairs such damage or destruction, in a manner consistent with the restored or rehabilitated appearance and quality of the property and structures, within thirty (30) days, or such longer time as may be approved by the City, of the date of such damage or destruction.
 3. The applicant shall maintain, and continually keep in full force and effect, insurance on the property, and all structures and improvements located thereon, in a sum of not less than the maximum insurable value of the same. Such insurance shall be issued by an insurer acceptable to the City and authorized to issue such insurance and otherwise do business in the State of Florida. The City shall be named as insured under such policy during such time as the loan is effective.
 4. The applicant shall comply with all laws, statutes, ordinances, rules and regulations of any kind, which may be imposed by any governmental entity with appropriate jurisdiction, regarding its use, restoration, and rehabilitation of the property and any structures thereon. Nothing in the grant and/or loan agreement shall be construed so as to alleviate the applicant from such obligation of compliance nor as a waiver of the jurisdiction of the City, or any other governmental authority, to impose such laws, statutes, or ordinances, rules, or regulations.
 5. The property and all structures thereon that are restored or rehabilitated using funds provided by a loan or grant (deferred loan) from the City through the City's historic property preservation loan program shall not be demolished, nor shall any structural or physical change to the historic character of the same be made during the period for which an outstanding balance is due on the loan or grant (deferred loan) from the City.
 6. The applicant (owner of the property), during the period for which an outstanding balance is due on the loan or grant (deferred loan) from the City, shall maintain and repair the property, and structures located thereon, in accordance with good preservation practice so as to preserve the architectural and historical integrity of the same in order to protect and enhance those qualities that made the property and structures eligible for participation in the City's subject program.
 7. In restoring and/or rehabilitating the property and any structures thereon, the applicant (owner) shall comply with the terms of the Certificate of Appropriateness issued by the Tallahassee-Leon County Architectural Review Board.
 8. Upon the applicant's repayment of the loan to the City, or in the case of a grant (deferred loan), the City's forgiving or applicant's repayment, of all sums received by the applicant pursuant to the award described above, the restrictions shall become null, void, and of no further force or effect; provided, however, that such repayment shall not relieve the applicant from its obligations to comply with all

laws, statutes, ordinances, rules and regulations which may be imposed in regard to the property by any governmental entity, including but not limited to the City, nor shall this paragraph be construed as a waiver of any such authority by the City.

9. These restrictions shall be enforceable by the city through appropriate proceedings at law or equity.

ADDITIONAL NON-CASH INCENTIVES

The City's Historic Property Grant and Revolving Loan Program is provided in addition to a number of other incentives, which are also available to assist in the restoration of historic Tallahassee properties. These incentives include:

1. Ad valorem tax relief: a) exemption from payment of City ad valorem taxes of up to 50% of the assessed value for qualifying properties and b) authorization for the property appraiser to assess qualifying properties solely on the basis of their character and current use for ad valorem tax purposes. Applies to properties that are used commercially or by certain not-for- profits.
2. Waiver of occupational license fees for historic properties, which are used to conduct business.
3. Waiver of a variety of permit fees, development review fees, and other rehabilitation-related fees, including:
 - a. building, plumbing, electric, mechanical, and fire permit fees;
 - b. roofing permits, gas permits, and re-inspection fees;
 - c. landscape and storm water permit fees;
 - d. variance fees and tree removal and rezoning fees
 - e. environmental management review fees
4. Eligibility for special provisions under the City's Gas Rebate Program and Energy Efficiency Loan Program.
5. Entitlement to modified enforcement of the Standard Building Code as provided in Chapter 34, Section 3401.5
6. Exemption from off-street parking requirements (must also be located in a Special Character District)
7. Preference to be given by the City to the acquisition or lease of historic properties when additional space is needed
8. Reservation of concurrency capacities

For more information call the Economic Development Department at (850) 891-8886.

Historical Property Grant and Loan Program Financial Rules

Tier I - Residential	Grant	Loan and/or Applicant Cash Match	Total
1 st \$ 10,000	\$10,000 (100%)	\$	\$ 10,000
2 nd 20,000	10,000 (50%)	10,000 (50%)	20,000
Next 70,000	21,000 (30%)	49,000 (70 %)	70,000
TOTAL	\$41,000	\$ 59,000	\$100,000
In excess of 100,000*		Up to 100% loan	
Tier II - Cultural/Retail/ Restaurant and Tier III-Other	Grant	Loan and/or Applicant Cash Match	Total
1 st \$ 25,000	\$ 17,500 (70%)	\$ 7,500 (30%)	\$ 25,000
2 nd 25,000	12,500 (50%)	12,500 (50%)	25,000
Next 50,000	11,000 (22%)	39,000 (78%)	50,000
TOTAL	\$ 41,000	\$ 59,000	\$100,000
In excess of 100,000*		Up to 100% loan	

**Funding needs in excess of \$100,000 could be funded either by applicant's cash and/or a city loan, subject to financial feasibility of project and funding availability. Projects may also qualify for additional grant funding under Section D, "Supplemental Funds Exceptional Cases," page 5.*



HISTORIC PROPERTY GRANT AND REVOLVING LOAN APPLICATION

- 1. Property Owner/Applicant Name: _____
- 2. Applicant Mailing Address: _____

- 3. Project Address: _____
- 4. Property Tax I.D. Number: _____
- 5. Years of Ownership of Project Property: _____
- 6. Present Employer and Address: _____

- 7. Current Position or Title: _____
- 8. Date of Hire: _____
- 9. Daytime Telephone: _____
- 10. Gross Salary*: \$ _____
- 11. Other Income*: _____

- 12. Please describe the purpose for the funding request (use additional sheets). Please include labeled, color pictures (at least 3” by 5”) of each side of the structure and the area to be repaired: ** _____

*Not required for residential type projects.
 ** A City energy audit must be attached for projects involving energy related improvements. Contact the City Energy Office at 891-0020.

**City Hall • 300 South Adams Street • Tallahassee, Florida 32301
 Telephone (850) 891-8886 • Fax (850) 891-2051 • TDD 1-800-955-8771**

13. Requested Funding Amount: \$ _____ Grant*
 \$ _____ Loan**
 \$ _____ TOTAL

14. Provide justification for the amount and type of funding requested in Item #12. (For residential type projects, a letter regarding the condition of the property should be obtained from the Historic Tallahassee Preservation Board and attached to the application to support the narrative response to this question; for all other types of projects, the narrative for this question should address the financial capacity of the project and reference the operating pro formas required in question #16.)

15. Please identify other sources of funding requested or planned for this project and the results of other funding requests: _____

16. Please provide a five (5) year operating pro forma of the project subsequent to restoration.***

17. Please provide a location map and quotes from three (3) licensed contractors to support the funding request.

18. If you are a business (including non-profit entity), please provide compiled financial statements for the past three (3) years and a listing of the names, addresses, and phone numbers of the board of directors or partners.

19. Complete the attached Application for Certificate of Appropriateness (COA) that will initiate review of the project by the Tallahassee-Leon County Architectural Review Board per City of Tallahassee Ordinance No. 93-O-0025. The application will not be reviewed by the Historic Property Grant and Loan Finance Committee until a COA has been obtained.

20. Please attach a statement from all lending institutions verifying that all mortgage payments on the property are current and that the lending institutions will provide updated information upon request by the Chair of the Historic Property Grant Loan and Finance Committee.

*If the requested grant amount exceeds \$41,000, the applicant must provide documentation of the original cost of the property and any prior improvements, as well as an appraisal of the projected value of the property performed by a MAI certified appraiser as prequalified by the City of Tallahassee Real Estate Division (850-891-8582)

**If the requested grant, loan or combination grant and loan amount is \$20,000 or greater for a Tier 2 or 3 type project, the project will be required to undergo an independent financial analysis by city staff or by a financial institution under contract to the City. Instructions on how to accomplish this will be provided by the Economic Development Department once the Historic Property Grant and Loan Finance Committee determines the project is eligible under the rules. The cost of an independent financial analysis is an eligible expense under the program.

***Not required for residential type properties.

TALLAHASSEE-LEON COUNTY
ARCHITECTURAL REVIEW BOARD
423 EAST VIRGINIA STREET
TALLAHASSEE, FL 32301
(850)488-7100

APPLICATION FOR CERTIFICATE OF APPROPRIATENESS

Applicant must submit the original signed application, as well as ten copies of the application and other required information. This information should be on standard or legal sized paper. All applications, unless waived by the Local Historic Preservation Officer, must include photographs consisting of the front view of the building as well as photographs identifying the areas where proposed work is to be done. Applicants must also submit site plans, elevations, material specifications and floor plans, unless waived by the Local Historic Preservation Officer. *It is strongly suggested that the applicant call the Architectural Review Board Staff prior to the submission of this application, to schedule a preapplication meeting and to discuss the required information)*

Building Address Historic Name of Building (if any)

Owner's Name Address Phone Number

Applicant's Name Address Phone Number

Architect/Contactor's Name Address Phone Number

PLEASE INDICATE THE TYPE(S) OF WORK PLANNED:

- REPAIRS REHABILITATION ADDITION
 NEW CONSTRUCTION DEMOLITION MOVING
 VARIANCE PILOT PARKING

OTHER: _____

Please describe the work to be performed. List each proposed exterior alteration to the building or property.

Has the owner applied for or received any city or state historic preservation grants or loans to assist with this project?_____

If yes, please briefly describe:

Do you request of the Architectural Review Board any variances on this project?_____

If yes, please describe and state justification:

The following information is required, unless waived in writing by the Local Historic Preservation Officer to the Architectural Review Board:

_____Photo(s) (3 1/2 x 5 or larger) of existing conditions

_____Site plan

_____Elevation(s)

_____Material sample(s) and/or specifications

_____Floor plans (only for projects receiving City of Tallahassee grants and/or loans)

Notification of intent to file an application must be received in writing by the Architectural Review Board at least 30 days in advance of the meeting to allow time for notification as required by the City of Tallahassee and Leon County. Completed applications must be submitted to the Architectural Review Board at least 15 days in advance of the meeting. The Architectural Review Board will act on completed applications only.

The Applicant or his/her representative must attend the meeting and present his/her proposal to the Architectural Review Board.

Decisions of the Architectural Review Board may be appealed to the City Commission by filing written notice with' the Tallahassee-Leon County Planning Department, City Hall, Tallahassee, FL 32301, within ten (10) days of. the decision. If there is no appeal or Commission action, the decision of the Architectural Review Board shall be final.

I/We, as owner(s) of (Street Address or Lot/Block/Subdivision)_____ do hereby authorize the filing of this application on my behalf.

(Printed Name)

(Signature)

Date

In accordance with local ordinance, the Tallahassee-Leon County Architectural Review Board (ARB) uses the federal *Secretary of the Interior's Standards for Rehabilitation* to guide them in review of exterior changes to properties zoned HPO. These Standards are stated below. The property owner is responsible for achieving compliance with these Standards. This form must be signed by the property owner or and by his/her/its authorized representative, the project architect and the project contractor and must be submitted to the ARB with and as part of the property owner's application for a Certificate of Appropriateness.

SECRETARY OF THE INTERIOR'S STANDARDS FOR REHABILITATION

- (1) A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.
- (2) The historic character of a property shall be retained and preserved. The removal of historic materials or alterations of features and spaces that characterize a property shall be avoided.
- (3) Each property shall be recognized as a physical record of its time, place and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.
- (4) Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
- (5) Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a historic property shall be preserved.
- (6) Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical or pictorial evidence.
- (7) Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.
- (8) Significant archaeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.
- (9) New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.
- (10) New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and environment would be unimpaired.

Each of the undersigned hereby acknowledges that he/she has read and understands fully the foregoing Standards and shall adhere to such Standards relative to this project.

Property Owner: _____

Date _____

Property Owner's Authorized Representative: _____

Date _____

Project Architect: _____

Date _____

Project Contractor: _____

Date _____

Historic Property Grants

The City of Tallahassee is accepting applications for funding under the Historic Property Grant and Loan Program. Applications may be submitted any time during the year. These grant and loan funds are available for eligible historic structures listed on the National Register of Historic Places or on the Local Register of Historic Places. Eligible historic properties must also be subject to the Historic Preservation Overlay as provided for in Section 10.4D of the city of Tallahassee Zoning, Site Plan Review, and Subdivision Regulations.

Funds may be used for stabilization for the purpose of restoration/rehabilitation of historic structures; structural repairs; facade restoration/rehabilitation; compliance with codes and health/safety requirements; and other construction activity that will result in a "total project" restoration/rehabilitation.

As of May 2003, funds cannot be used for routine maintenance activities that are a part of normal property ownership, including the repair or replacement of non-historic roofs, unless those activities are part of a "total restoration/rehabilitation" project. Each project will be determined on a case-by-case review. Routine maintenance would include such projects as painting, roof replacement/repair, window repair or any other non-historic repair.

Grant funds can be used for the cost difference between a non-historic repair and a historic repair. For example, if the cost of repairing wooden historic windows is \$5,000 and it costs \$2,000 to replace the wooden historic windows with vinyl windows, the city may approve a grant for the difference in cost (\$3,000) to assist in maintaining the historic appearance of the home. When restoring historic homes materials used should be of a historic nature.

Preference for the funding of projects will fall first to residential projects; second to cultural, retail, and restaurant projects; and third to other types of projects.

Incentives Currently Provided by the City for HPO Properties on the Local Register of Historic Places Privately Owned (May 2003)

1. Ad valorem tax relief: a) exemption from payment of City ad valorem taxes of up to 50% of the assessed value for qualifying properties and b) authorization for the property appraiser to assess qualifying properties solely on the basis of their character and current use for ad valorem tax purposes. Applies to properties that are used commercially or by certain not-for-profits.*
2. Waiver of occupational license fees for historic properties, which are used to conduct business
3. Waiver of a variety of permit fees, development review fees, and other rehabilitation-related fees, including:
 - a. building, plumbing, electric, mechanical, and fire permit fees

- b. roofing permits, gas permits, and re-inspection fees
- c. landscape and storm water permit fees
- d. variance fees and tree removal and rezoning fees
- e. environmental management review fees
4. Eligibility for special provisions under the City's Gas Rebate Program and Energy Efficiency Loan Program.
5. Entitlement to modified enforcement of the Standard Building Code as provided in Chapter 34, Section 3401.5
6. Exemption from off-street parking requirements (must also be located in a Special Character District)
7. Preference to be given by the City to the acquisition or lease of historic properties when additional space is needed
8. Reservation of concurrency capacities
9. Eligibility for funding under the City Historic Property Grant and Loan Program

** Does not require HPO designation, but must meet State law requirement*

Submit Applications to Economic Development Department, 300 S. Adams Street-
Mailbox A-11, Tallahassee, Florida 32301.