



November 21, 2018

**Interstate Historic Preservation Trust Fund Loan Application**  
A Revolving Loan Program for Historic Districts Impacted by Interstate Construction

**EXHIBIT A**

DATE RECEIVED: \_\_\_\_\_ PROPERTY OWNERSHIP VERIFICATION: DATE: \_\_\_\_\_ INITIAL: \_\_\_\_\_  
VERIFICATION LEGAL DESCRIPTION: FORWARD INFORMATION TO HOUSING: OUTCOME: \_\_\_\_\_  
DATE: \_\_\_\_\_ INITIAL: \_\_\_\_\_ DATE: \_\_\_\_\_ INITIAL: \_\_\_\_\_ DATE: \_\_\_\_\_ INITIAL: \_\_\_\_\_

The application submitted must be complete (including required attachments) and received by **3:00 P.M.** local time on **March 20, 2019**. Applications received after the submission deadline will not be considered.

**PART I**

BUILDING/PROPERTY ADDRESS: \_\_\_\_\_

PROPERTY OWNER OF RECORD: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, STATE: \_\_\_\_\_

AUTHORIZED AGENT\*: \_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, STATE: \_\_\_\_\_

DAYTIME  
PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

CELL: \_\_\_\_\_

DAYTIME  
PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

CELL: \_\_\_\_\_

ZIP: \_\_\_\_\_

ZONING DISTRICT: \_\_\_\_\_

TAX FOLIO NUMBER: \_\_\_\_\_

CURRENT USE: \_\_\_\_\_

PROPOSED USE: \_\_\_\_\_

LEGAL: Block: \_\_\_\_\_ Lot: \_\_\_\_\_

Subdivision: \_\_\_\_\_

**\*DESIGNATION OF AN AUTHORIZED AGENT  
REQUIRES COMPLETION OF EXHIBIT D**



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**PART II**

1. **NATIONAL REGISTER HISTORIC DISTRICT:** YBOR CITY ☐ TAMPA HEIGHTS ☐ WEST TAMPA ☐

2. **PROJECT TYPE:** **BUILDING'S DATE OF CONSTRUCTION:** \_\_\_\_\_

Structural Stabilization ☐

Electric, Mechanical, or Plumbing ☐

Mothballing ☐

Exterior Restoration / Reconstruction of Architectural Details ☐

Soft Costs (Architectural or Engineering) ☐

3. **DESCRIBE THE PROJECT FOR WHICH FUNDING IS REQUESTED. THE REQUEST MUST BE FOR ONE OF THE CATEGORIES CITED IN ITEM 2 ABOVE. (Note: A minimum of 50% of the funds are required to be spent on exterior restoration, rehabilitation and reconstruction of architectural details.)**

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ALL RESPONDENTS MUST COMPLETE THE ATTACHED **PROJECT FINANCIAL PLAN WORKSHEET (Exhibit B)**

ALL RESPONDENTS MUST COMPLETE THE ATTACHED **FINANCING DUE DILIGENCE WORKSHEET (Exhibit C)** AS EVIDENCE THAT THE APPLICANT HAS TAKEN REASONABLE STEPS TO DEMONSTRATE THAT THE PROJECT CANNOT BE FULLY FUNDED USING CONVENTIONAL FINANCING AND THAT THE REQUESTED LOAN IS THEREFORE NECESSARY.

4. **PROVIDE A BRIEF EXPLANATION OF HOW THE PROPOSED PROJECT ADDRESSES THE EVALUATION CRITERIA AS FOLLOWS, SPECIFICALLY HOW DOES THE PROJECT:**

- SERVE AS A CATALYST FOR HISTORIC PRESERVATION PROJECTS IN THE IMMEDIATE VICINITY?

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- HOW DOES THE PROJECT ALLEVIATE OR PREVENT ENDANGERMENT OF HISTORIC PROPERTY?

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## Interstate Historic Preservation Trust Fund Loan Application

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- WHAT IS THE IMPORTANCE OF THE STRUCTURE AS RELATED TO ITS HISTORIC AND/OR ARCHITECTURAL SIGNIFICANCE? FOR EXAMPLE, A CONTRIBUTING STRUCTURE IN AN HISTORIC DISTRICT WILL RANK HIGHER THAN A NON-CONTRIBUTING STRUCTURE.

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- WHAT ARE THE QUALIFICATIONS OF THE APPLICANT and/or PROFESSIONALS COMPOSING THE PROJECT TEAM?

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5. DESCRIBE ANY CONSTRUCTION ACTIVITY THAT HAS OCCURRED ON THE SITE IN THE LAST FIVE (5) YEARS.

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6. PROVIDE EVIDENCE OF YOUR MEANS TO MAINTAIN THE PROPOSED IMPROVEMENT.

- a) How long have you been a homeowner/property owner? \_\_\_\_\_
- b) How long have you owned, or previously owned, a historic property? \_\_\_\_\_ Explain: \_\_\_\_\_

- c) What other historic homes/properties have you owned? (List Addresses and number of years owned): \_\_\_\_\_

- d) Have you attended any home ownership or historic preservation courses? \_\_\_\_\_ If yes, Please specify \_\_\_\_\_

- e) Provide any other additional information that demonstrates your ability to maintain the improvement for which the funds are being requested. \_\_\_\_\_
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7. USE THE SPACE BELOW TO DESCRIBE ANY ADDITIONAL INFORMATION THAT IS PERTINENT IN REVIEWING THIS PROJECT.

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November 21, 2018

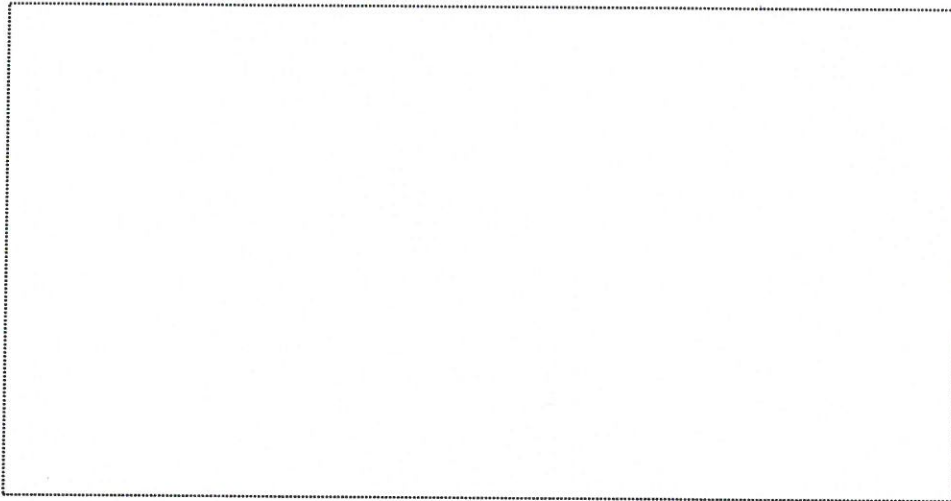
## Interstate Historic Preservation Trust Fund Loan Application

A Revolving Loan Program for Historic Districts Impacted by Interstate Construction

8. TERM AND AMOUNT OF FUNDING REQUESTED (Refer to program Procedures and Standards for appropriate term information) -

LOAN AMOUNT: \_\_\_\_\_ (NOT TO EXCEED \$200,000.00) TERM: NUMBER OF MONTHS \_\_\_\_\_ and/ or YEARS \_\_\_\_\_

9. ATTACH A 3" X 5" PHOTOGRAPH OF THE FRONT ELEVATION OF THE PROPERTY.



I understand that, in accordance with Chapter 119 of the Florida Statutes, and, except as may be provided by Chapter 119 of the Florida Statutes and other applicable State and Federal Laws, all applicants should be aware that the application and the responses thereto are in the public domain and are available for public inspection.

I understand that funds and awards also require that application will be made to the Architectural Review Commission (ARC) or Barrio Latino Commission (BLC), as appropriate, when the Certificate of Appropriateness process applies. The applicant will be required to pay appropriate ARC and BLC submittal fees. All appropriate permits for construction must be obtained.

All applications must adhere to the City of Tampa Ethics Code as referenced in the Interstate Historic Preservation Trust Fund Procedures and Standards.

I hereby certify that the information on this application is true and complete, and I understand the intent of the Trust.

\_\_\_\_\_  
SIGNED (Property Owner/Agent)

\_\_\_\_\_  
SIGNED (Property Owner/Agent)

Sworn to and subscribed before me this

\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Notary Public, State of Florida

My Commission Expires: \_\_\_\_\_





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**Interstate Historic Preservation Trust Fund Loan Application**  
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**EXHIBIT B**

**PROJECT FINANCIAL PLAN WORKSHEET**

**PROJECT BUDGET and FUNDING SOURCES**

<b><u>Budget Items</u></b>	<b>Sub-Total Cost</b>
<b><u>Project Budget (Attach Basis for Estimates)</u></b>	
Design	\$ .00
Engineering	\$ .00
Construction Estimate	\$ .00
Construction Contingency (Maximum 10% of Construction Estimate)	\$ .00
Financial Transaction Expenses (e.g. closing costs)	\$ .00
Other (Specify)	\$ .00
Other (Specify)	\$ .00
Other (Specify)	\$ .00
<b><u>Total Budget Uses</u></b>	<b>\$ .00</b>
<b>* <u>Funding Sources</u></b>	
Personal/ Corporate Equity	\$ .00
Bank Loan	\$ .00
Other (Specify)	\$ .00
Other (Specify)	\$ .00
Requested Historic Trust Fund Loan	\$ .00
<b><u>Total Funding Sources</u></b>	<b>\$ .00</b>

APPLICATIONS THAT HAVE A FUNDING DEFICIT ARE IN-ELIGIBLE FOR CONSIDERATION. THE **TOTAL BUDGET USES** MUST BE COVERED BY **TOTAL FUNDING SOURCES**.

\* PLEASE ATTACH A COMMITMENT LETTER TO EVIDENCE EACH FUNDING SOURCE LISTED ABOVE



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# **Interstate Historic Preservation Trust Fund Loan Application** A Revolving Loan Program for Historic Districts Impacted by Interstate Construction

## **EXHIBIT C**

### **FINANCING DUE DILIGENCE WORKSHEET**

**NOTE: ALL RESPONDENTS MUST COMPLETE THE FINANCING DUE DILIGENCE WORKSHEET AS EVIDENCE THAT THE APPLICANT HAS TAKEN REASONABLE STEPS TO DEMONSTRATE THAT THE PROJECT CANNOT BE FULLY FUNDED USING CONVENTIONAL FINANCING AND THAT THE REQUESTED LOAN IS THEREFORE NECESSARY. PLEASE LIST ALL THE SOURCES OF FUNDING WHICH WERE SOUGHT THROUGH CONVENTIONAL FINANCING.**

Date	Institution	Contact Name	Phone #.	Application Amount	Response
1			( ) -		
2			( ) -		
3			( ) -		
4			( ) -		
5			( ) -		
6			( ) -		
7			( ) -		
8			( ) -		





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**Interstate Historic Preservation Trust Fund Loan Application**  
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**EXHIBIT D**

**AFFIDAVIT TO AUTHORIZE AGENT**

STATE OF FLORIDA - COUNTY OF HILLSBOROUGH

\_\_\_\_\_  
(NAME OF ALL PROPERTY OWNERS) \_\_\_\_\_ who reside(s) at

\_\_\_\_\_  
(ADDRESS: STREET, CITY, STATE, ZIP) \_\_\_\_\_ (PHONE NUMBER)

being first duly sworn, depose(s) and say(s):

1. That (I am/we are) the owner(s) and record title holder(s) of the following described property:  
Address or General location \_\_\_\_\_  
\_\_\_\_\_
2. That this property constitutes the property for which a request for a: (NATURE OR REQUEST)  
\_\_\_\_\_  
\_\_\_\_\_ is being applied to the Interstate Historic Preservation Trust Fund, Tampa, Florida;
3. That the undersigned (has/have) appointed and (does/do) appoint: Name \_\_\_\_\_  
Address \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_  
as (his/their) agent(s) to execute any petitions or other documents necessary to affect such petition;
4. That this affidavit has been executed to induce the City of Tampa, Florida to consider an act on the above described property;
5. That (I/we), the undersigned authority, hereby certify that the foregoing is true and correct.

\_\_\_\_\_  
SIGNED (Property Owner)

\_\_\_\_\_  
SIGNED (Property Owner)

\_\_\_\_\_  
SIGNED (Property Owner)

\_\_\_\_\_  
SIGNED (Property Owner)

Sworn To and Subscribed before me  
this \_\_\_\_\_ day of \_\_\_\_\_,  
20\_\_\_\_.

My Commission Expires:

\_\_\_\_\_  
NOTARY PUBLIC, STATE OF FLORIDA





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**Interstate Historic Preservation Trust Fund Loan Application**  
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**EXHIBIT E**

**Financial Evaluation Authorization Form**

**IN ORDER TO VERIFY EMPLOYMENT, INCOME, ASSET BALANCES, CREDIT HISTORY,  
RENTAL & MORTGAGE HISTORY**

TO WHOM IT MAY CONCERN:

I hereby authorize Housing & Community Development, the "Lender", its successors and assigns, to verify my past and present employment earnings records, bank accounts, stock holdings and any other asset balances that are needed to process my loan application. I further authorize the "Lender" to verify my Mortgage and Rental History and order a credit report and verify any other credit information.

**It is understood that a photocopy of this form will also serve as authorization.**

The information that is obtained is to be used in the processing of my application for a mortgage loan and for subsequent quality control verification.

I hereby acknowledge that I am fully aware that it is a federal crime punishable by fine or imprisonment, or both, to knowingly make any false statements concerning any of the information on my application for a mortgage loan, as applicable under provisions of Title 18, United States Code, Section 1014.

\_\_\_\_\_  
Borrower

\_\_\_\_\_  
Date

\_\_\_\_\_  
Co-Borrower

\_\_\_\_\_  
Date



**Interstate Historic Preservation Trust Fund Loan Application**  
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**EXHIBIT F**

**LOAN UNDERWRITING FORM**

**Note: IF THIS APPLICATION IS PART OF A CORPORATE/COMPANY/PARTNERSHIP APPLICATION, PLEASE PROVIDE CURRENT FINANCIAL STATEMENTS INCLUDING BALANCE SHEET AND PROFIT AND LOSS STATEMENT. INDIVIDUAL INFORMATION IS NEEDED ONLY FOR THE ORGANIZATION'S PRINCIPAL WHO WILL ALSO BE EXECUTING LOAN DOCUMENT**

**GENERAL INFORMATION:**

	APPLICANT		CO-APPLICANT	
Full Name (include Jr. or Sr. if applicable)				
Date of Birth / Age				
Marital Status	( ) Married ( ) Unmarried	( ) Married ( ) Unmarried	( ) Married ( ) Unmarried	( ) Married ( ) Unmarried
	( )	Yrs. School	( )	Yrs. School
Home Phone (incl. Area Code)				
Present Address (Street)				
City, State, Zip Code				
( ) Own ( ) Rent _____ No. Yrs.	Monthly Rent/Mortgage \$ _____			
Landlord/Apartment Name: _____	Phone: _____			
Address: _____				

Former Address (if residing at present address less than two years)	
Address (Street)	
City, State, Zip Code	
( ) Own ( ) Rent _____ No. Yrs.	Monthly Rent/Mortgage \$ _____
Landlord/Apartment Name: _____	Phone: _____
Address: _____	

**Is Applicant, Co-Applicant, or any other household member, age 18 or older, a full-time student?**  
( ) Y ( ) N If yes; please list names:



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### EMPLOYMENT INFORMATION:

	APPLICANT	CO-APPLICANT
Employer Name		
Employer Address		
City/State/Zip Code		
Employer Phone #	(    )	(    )
Position/Title		
Time/Dates Employed		
Pay Rate & Frequency/# Hours		

If employed in current position for less than two years or if currently employed in more than one position, complete the following:

EMPLOYMENT INFORMATION:	APPLICANT	CO-APPLICANT
Employer Name		
Employer Address		
Employer Phone #		
Position/Title		
Time/Dates Employed		
Pay Rate & Frequency/# Hours		

### OTHER SOURCES OF INCOME:

(For ALL Household Members 18 and Over)

List Business or Rental Net Income, Child Support, Alimony, Social Security, Pensions, Unemployment or Workers Compensation, Welfare Payments, etc.

Name of Recipient	Type of Income	Gross Annual Income
1.		\$
2.		\$
3.		\$
4.		\$
5.		\$
6.		
		Total \$





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### ASSETS AND ASSET INCOME:

List Checking and Savings Accounts, IRA, CD, Bonds, Stocks, Property Equity, Cash Value of Pensions and Insurance Policies, etc.

Type of Asset:	Asset Value	Bank/Ins. Co. Name	Account #	Annual Asset Income
1.	\$			\$
2.	\$			\$
3.	\$			\$
4.	\$			\$
5.	\$			\$
6.	\$			\$
				Total \$

### LIABILITIES:

List Credit Card Debt, and Automobile, Real Estate and Mortgage Loans, etc.

Type: (Credit/Loan, etc.)	Creditor's Name	Balance Owed	Monthly Payment
1.		\$	\$
2.		\$	\$
3.		\$	\$
4.		\$	\$
5.		\$	\$
6.		\$	\$
		Total Monthly Payments: \$	

I/We understand that Florida Statute 817 provides that willful false statements or misrepresentation concerning income; asset or liability information relating to financial condition is misdemeanor of the first degree, punishable by fines and imprisonment provided under Statutes 775.082 or 775.83. I/We further understand that any willful misstatement of information will be grounds for disqualification. I/We certify that the application information provided is true and complete to the best of my/our knowledge. I/We consent to the disclosure of information for the purpose of income verification related to making a determination of my/our eligibility for program assistance. I/We agree to provide any documentation needed to assist in determining eligibility and are aware that all information and documents provided are a matter of public record.

Applicant Signature \_\_\_\_\_

Co-Applicant Signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_



December 20, 2018

## **Interstate Historic Preservation Trust Fund**

A Revolving Loan Program for Historic Districts Impacted by Interstate Construction

### **CHECKLIST**

All responses must be typed or printed in ink and confined to the spaces provided. Each application submitted must be complete (including required attachments) and received by **3:00 P.M.** local time on **March 20, 2019**. Applications received after the submission deadline will not be considered.

### **MAIL or DELIVER COMPLETED APPLICATIONS TO:**

**PURCHASING DEPARTMENT**

**CITY OF TAMPA**

**306 E. Jackson St., 2E**

**Tampa, Fl 33602**

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A COMPLETE Application Packet for the Trust Fund includes:

- ☐ APPLICATION INSTRUCTIONS
- ☐ PROCEDURES AND STANDARDS
- ☐ **EXHIBIT A - APPLICATION FORMS PART I AND PART II**
- ☐ **EXHIBIT B - PROJECT FINANCIAL PLAN WORKSHEET**
- ☐ **EXHIBIT C - FINANCING DUE DILIGENCE WORKSHEET**
- ☐ **EXHIBIT D - AFFIDAVIT TO AUTHORIZE AGENT**
- ☐ **EXHIBIT E - FINANCIAL EVALUATION AUTHORIZATION FORM**
- ☐ **EXHIBIT F - LOAN UNDERWRITING FORM**
- ☐ **EXHIBIT G - AGREEMENT AND DECLARATION OF COVENANTS AND RESTRICTIONS**

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### **NECESSARY ENCLOSURES: THESE DOCUMENTS MUST BE SUBMITTED WITH THE TRUST FUND APPLICATION IN ORDER FOR THE APPLICATION TO BE CONSIDERED COMPLETE.**

- ☐ Application Forms, Part I and II (**EXHIBIT A**)
- ☐ Please attach a commitment letter to evidence each funding source listed in the **PROJECT FINANCIAL PLAN WORKSHEET (EXHIBIT B)**.
- ☐ Complete the **FINANCING DUE DILIGENCE WORKSHEET (EXHIBIT C)**. Please provide a copy of the outcome letter from each conventional funding source.
- ☐ Complete the **AFFIDAVIT TO AUTHORIZED AGENT (EXHIBIT D)**, if anyone will be representing the property owner(s).
- ☐ Complete the **FINANCIAL EVALUATION AUTHORIZATION FORM (EXHIBIT E)**.
- ☐ Complete the **LOAN UNDERWRITING FORM (EXHIBIT F)**.
- ☐ Complete the **AGREEMENT AND DECLARATION OF COVENANTS AND RESTRICTIONS (EXHIBIT G)**.





## **Interstate Historic Preservation Trust Fund Loan Program**

**A Revolving Loan Program for Historic Districts Impacted by Interstate Construction**

### **APPLICATION INSTRUCTIONS**

Application to the Interstate Historic Preservation Trust Fund should be completed after reading these instructions. All responses must be typed or printed in ink and confined to the spaces provided. Each application submitted must be complete (including required attachments) and received by 3:00 p.m. local time on March 20, 2019. Applications received after the submission deadline will not be considered.

#### **MAIL or DELIVER COMPLETED APPLICATIONS TO**

**City of Tampa Purchasing Department**

**Bid Control Division**

**306 E. Jackson St., 2E**

**Tampa, FL 33602**

#### **SUBMISSION FORMAT**

- **Submit an original copy that bears original authorized signatures and three additional copies. Owner/agent shall maintain a copy for future reference.**
  - **Submit copy of construction estimates.**
  - **Staple application in the upper left-hand corner.**
    - **No binders or folders, please.**
  - **Do not submit instructions with application.**

#### **For Assistance**

**Historic Preservation and Application Assistance:**

**Dennis Fernandez**

**813-274-3100, option 3**

**Dennis.Fernandez@tampagov.net**

**Loan information, Loan Eligibility, or Payment Schedules:**

**Trena Gaston-Gardner**

**813-274-7933**

**Trena.Gaston-Gardner@tampagov.net**

**For information, please refer to the Architectural Review & Historic Preservation web site:**

**<http://www.tampagov.net>**





## **Interstate Historic Preservation Trust Fund Loan Program**

**A Revolving Loan Program for Historic Districts Impacted by Interstate Construction**

The following is provided to assist the applicant in completing an Application for a loan from the Interstate Historic Preservation Trust Fund (Exhibit A). Part I. & Part II. must be completed for an application to be accepted. Do not leave a request for information unanswered. If an item does not apply, insert or answer "Not Applicable (N/A)".

### **PART I**

1. Answer each item as requested.
2. Consult real estate records and current tax bill as needed.
  - Designation of an authorized agent requires completion of **EXHIBIT D**

### **PART II**

1. Contact the Historic Preservation Office to verify if the subject property is in an eligible **National Register Historic District**.
2. Indicate a **Project Type** from the following project scopes: (Note: A minimum of 50% of the funds are required to be spent on exterior restoration, rehabilitation and reconstruction of architectural details).
  - **Structural Stabilization** – Includes rehabilitation to the foundation, walls, joists and planks, roof, or building frame.
  - **Electrical, Mechanical, or Plumbing** – Includes the electric main power service, wiring, outlets, exterior fixtures, and control devices. Mechanical systems include heating, ventilating, air conditioning, plumbing, and fire suppression system.
  - **Mothballing** - The process of closing a building temporarily to protect the building from weather, as well as to secure it from vandalism. Application for Mothballing must satisfy the National Parks Service criteria for Mothballing as delineated in *Preservation Brief #31*.
  - **Minor Additions** - Including exterior stairs to meet current code requirements, building addition for a contemporary adaptation, or reconstruction of a building portion that has been lost.
  - **Exterior Restoration/Reconstruction of Exterior Architectural Details** - Includes windows and doors, chimneys, porches, and historically correct decorative details.
  - **Soft Cost (Architectural or Engineering)** - Includes professional service necessary to evaluate the condition of a building or provide the documents to initiate the rehabilitation of a building.
3. **Project Description** - Describe the project for which the funding is requested. Describe each of the major work items.



## **Interstate Historic Preservation Trust Fund Loan Program**

**A Revolving Loan Program for Historic Districts Impacted by Interstate Construction**

4. **Evaluation Criteria** - Describe how the project is going to accelerate historic preservation in the neighborhood of the project site. Specify the qualifications of the project team in accomplishing the scope of the proposed project.
5. **Construction Activity** - Summary of project related activities that have been completed in the last five years. This could be architectural drawings, engineering reports or related documents. If available, submit architectural drawings with application.
6. **Means to maintain** - Provide evidence of the applicant's ability to maintain the project for which funds are being requested following its completion. Indicate the applicant's personal history of owning and maintaining historic properties.
7. **Additional Information** - This is the applicant's opportunity to provide relevant information about the project not presented elsewhere. This could include information on architectural history or a significant event that occurred in the building or on the site.
8. **Term and Amount of Funding** - Complete the information as requested.
9. **Photograph** – This must be a photo taken within the last three weeks. The photo can be color or black & white.
  - **Signatures** – Please ensure that all the submitted information is correct, that the applicant understands all items, and that the correct signatures are included and notarized.
  - **Construction Estimate(s)** – Please attach a construction estimate(s) for the project for which funding is requested. The construction estimate should itemize each element of the project.
  - All applicants must complete the **PROJECT FINANCIAL PLAN WORKSHEET (EXHIBIT B)** and the **FINANCING DUE DILIGENCE WORKSHEET (EXHIBIT C)**. Financing must have been sought through conventional financing sources and indicated on **EXHIBIT C** in order to qualify for an *INTERSTATE HISTORIC PRESERVATION TRUST FUND* loan.
  - All applicants must complete the **FINANCIAL EVALUATION AUTHORIZATION FORM (EXHIBIT E)** and the **LOAN UNDERWRITING FORM (EXHIBIT F)**. Application submissions that are part of a Corporate/Company/Partnership application are required to provide current financial statements including Balance Sheets, and Profit & Loss Statements. Individual information is required for the organization's principal who will be executing the loan document.





## Interstate Historic Preservation Trust Fund Loan Program

### Q & A

1. **How do I know if my property is eligible for the Interstate Historic Preservation Trust Fund loan program?** The property must be located in one of the National Register Historic Districts of Ybor City, Tampa Heights or West Tampa, and constructed more than seventy-five (75) years prior to the date of the application.
2. **How long before I know if I am awarded a loan?** City Council approval is anticipated within 2 months of a recommendation by the Advisory Committee.
3. **If my application qualifies for a Trust Fund loan, but is not awarded a loan, will I be able to re-apply during the next cycle?** Yes.
4. **How will the loan funds be disbursed?** The loan will be dispersed in draws. The number of draws will be dependent on the scope of the project. An inspector will verify that all work is completed prior to a draw request being approved.
5. **How is the loan interest determined?** The interest rate on Trust Fund loans shall be based upon the published Ten Year Treasury Note rates for a term to correspond with the term of the loan approved by the Advisory Committee.
6. **How do I obtain application forms to apply to the Interstate Historic Preservation Trust Fund?** Application forms are available at the City of Tampa's Architectural Review & Historic Preservation web site: [www.tampagov.net](http://www.tampagov.net) or can be obtained at the Historic Preservation Offices. Call 813-274-3100, option 3 for information.
7. **Is there a limit to the number of times a person or business can apply?** An individual is able to apply to the fund once per cycle per property folio number. Eligible owners may receive funding through the Trust Fund loan program only once per calendar year per property folio number. Subsequent applications to the Trust Fund must encompass a different project for which the funds are being sought, but may be applied to the same property folio number.
8. **What is the maximum loan amount that I can apply for?** The Interstate Historic Preservation Trust Fund Advisory Committee may award a maximum of \$200,000.00 to a single project per funding request. A property owner is limited to a maximum of \$400,000.00 in total funding through the Trust Fund loan program per property folio number.
9. **Are there any other preservation incentives, grants or programs that I can apply for to assist me in the rehabilitation of my building?** There are a number of programs that property owners may qualify for that can provide financial assistance or tax relief for historic building rehabilitation projects. For a list of these programs visit the City of Tampa's Historic Preservation web site at [www.TampaGov.net](http://www.TampaGov.net).
10. **Who should I call if I have questions about my application?**

#### Historic Preservation and Application Assistance:

Dennis Fernandez  
813-274-3100, option 3  
[Dennis.Fernandez@tampagov.net](mailto:Dennis.Fernandez@tampagov.net)

#### Loan information, Loan Eligibility, or Payment Schedules:

Trena Gaston-Gardner  
813-274-7933  
[Trena.Gaston-Gardner@tampagov.net](mailto:Trena.Gaston-Gardner@tampagov.net)

**Note:** The Q&A sheet is intended to provide general information. Please refer to the City of Tampa's *Interstate Historic Preservation Trust Fund Loan Program Procedures and Standards* document for complete program information.

Si usted necesita ayuda en español, llame a 813-274-3100 Option 3





## **Interstate Historic Preservation Trust Fund Loan Program**

**A Revolving Loan Program for Historic Districts Impacted by Interstate Construction**

### **PROCEDURES AND STANDARDS**

#### **Interstate Historic Preservation Trust Fund Loan Program (Program)**

##### **Mission**

The mission of the Interstate Historic Preservation Trust Fund (Trust Fund) is to accelerate the exterior historic preservation of properties in the National Register Historic Districts of Ybor City, Tampa Heights, and West Tampa.

##### **Goal**

To enable the owners of historic properties within the National Register Historic Districts of Ybor City, Tampa Heights, and West Tampa to preserve the character and structure of those historic properties by providing exterior preservation funds for eligible owners and projects.

##### **Application Deadline**

Applications will be received through the Purchasing Department until **3:00 p.m. (EDT), March 20, 2019**. Applications received after the submission deadline will not be considered. Applications may be mailed, express mailed, or hand delivered to:

**City of Tampa Purchasing Department  
Bid Control Division  
306 E. Jackson, St., 2<sup>nd</sup> Floor  
Tampa, FL 33602**

##### **Review Process**

The City of Tampa evaluates all applications on a competitive basis. The Interstate Historic Preservation Trust Advisory Committee (Advisory Committee) will advise the Mayor of Tampa and Tampa City Council on the allocation of the funds available for distribution.

##### **Application Procedure**

- a) Applications may be submitted by property owners, not-for-profit organizations, together with cities, counties, or other units of local government.
- b) Interested applicants shall obtain an application for assistance under the Trust Fund from the City of Tampa Historic Preservation Division. The Historic Preservation Division shall determine eligibility of the project under the requirements of the Trust Fund. When a project is determined to be eligible, the property owner will be referred to the City of Tampa Housing and Community Development Division (HCD) for financial review and underwriting. Following the timely receipt of the **TRUST FUND APPLICATION (EXHIBITS A-G)**, and verification of applicant eligibility to participate in the Interstate Historic Preservation Trust Fund Loan Program (Program), the application submissions will

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## Interstate Historic Preservation Trust Fund Loan Program

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be scheduled before the Advisory Committee for consideration. If an application is successful, the applicant will then be offered a loan to be secured by the applicant's historic property. Applicants are not required to accept a loan because they submit an application or have Program funds allocated to them. Loans are made without regard to race, color, religion, national origin, sex, handicap, or familial status.

The City of Tampa reserves the right to reject any and all applications with or without cause, waive any informality of any application, cancel the application cycle, and make all awards in the best interest of the City and the Interstate Historic Preservation Trust Fund.

#### **Eligibility Requirements** (all of the following eligibility requirements must be met)

- Applications that have a funding deficit are ineligible for consideration. The total project budget must be covered by total funding sources, as evidenced by a completed **PROJECT FINANCIAL PLAN WORKSHEET (EXHIBIT B)** of the application. Applicants must provide proof of funding sources including owner funds being utilized in the project.
- Financing must have been sought and attempted through an institutional lender. All sources are to be indicated on **FINANCING DUE DILIGENCE WORKSHEET (EXHIBIT C)**. Applicants must provide **an outcome letter** from each conventional funding source.
- Located in the National Register Historic Districts of Ybor City, Tampa Heights, or West Tampa and constructed more than seventy-five (75) years prior to the date of the application.
- All exterior work included in the application adheres to the Secretary of the Interior's Standards for the Rehabilitation of Historic Properties.
- Funds cannot be used for acquiring property.
- Does not include interior rehabilitation or restoration except for electrical, mechanical and plumbing improvements necessary for proper preservation and/or exterior improvements to the structure. A minimum of 50% of the funds are required to be spent on exterior restoration, rehabilitation and reconstruction of architectural details.
- Work identified in the scope of the project in the application has not been initiated.

#### **Evaluation Criteria for Application**

*The Advisory Committee will utilize the following criteria to evaluate and rank each eligible project received in the application cycle. The Advisory Committee will evaluate and rank each application based, in general, upon the selection criteria identified below and the extent to which the project fulfills the mission of the Trust Fund. It is the responsibility of the applicant to demonstrate clearly within the application that the project addresses the evaluation criteria. The criteria that will be used as a general guide to evaluate and rank the application include, but are not limited to, the following:*

- Catalyst for historic preservation projects in the immediate vicinity.
- Project alleviates or prevents endangerment of historic property.
- Importance of the structure as to its historic and/or architectural significance. For example, a contributing structure in an historic district will rank higher than a non-contributing structure.





## **Interstate Historic Preservation Trust Fund Loan Program**

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- Qualifications of the applicant and/or professionals composing the project team.
- Financial Commitments: Applicant has identified the monetary scope of the project and has sought conventional sources of funding and/or has pledged personal/corporate funds to initiate and complete the project for which Trust Fund monies are sought. Applicant shall provide documentary evidence of all funding sources necessary to complete the project except for the funding source being sought through a grant application. Personal financial commitment will rank higher than applications that do not include a personal financial commitment. Applications with a shorter loan term being requested will rank higher than applications for projects of similar scope, but with a longer loan term being requested. Applications that have a funding deficit are ineligible for consideration.

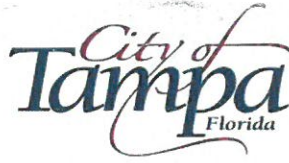
#### **Eligible Activities Which May Be Funded in Order of Priority**

- Structural Stabilization or relocation of an eligible structure
- Exterior restoration, rehabilitation, or reconstruction of architectural details.
- Mothballing
- Electrical, mechanical and plumbing improvements necessary for proper preservation and/or exterior improvements to the structure.
- Soft costs (architectural or engineering) when included as part of scope of stabilization, mothballing, restoration or reconstruction project.
- Minor additions for contemporary adaptation of buildings.

#### **Program Requirements**

- a) Eligible property owners may receive funding through the Trust Fund loan program only once per calendar year per property folio number. Subsequent applications to the Trust Fund must encompass a different project for which the funds are being sought, but may be applied to the same property folio number.
- b) Applicants can request a maximum loan amount of \$200,000.00.
- c) A property owner is limited to a maximum of \$400,000.00 in total funding through the Trust Fund per property folio number for a period of ten years.
- d) Applicants must attach a commitment letter to evidence each funding source listed in **PROJECT FINANCIAL PLAN WORKSHEET (EXHIBIT B)**. The Total Costs of Project must be covered by the Total Project Funding. The loan amount requested shall not exceed the cost of the approved work. Applications that have a funding deficit are ineligible for consideration.
- e) Conventional financing must have been sought and attempted through an institutional lender. Source to be indicated on **PROJECT FINANCIAL PLAN WORKSHEET (EXHIBIT B)**, in order to qualify for a Trust Fund loan. Applicants must provide **an outcome letter from each** conventional funding source.
- f) Loan recipients are required to commence construction of the Project within three months of the disbursement date of the loan and be completed within one year from the date of disbursement of the loan.





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- g) A minimum of 50% of the loan award is required to be spent on exterior restoration, rehabilitation and reconstruction of architectural details.
- h) A maximum of 10% of the loan award may be applied to soft costs.
- i) Approval of the Project plans by City of Tampa Historic Preservation staff is required prior to initiation of the approved Project. Applicants that initiate or complete the Project work without prior approval of the Project plans will be disqualified from receiving a Trust Fund loan.
- j) The property must be in compliance with all City of Tampa codes.

### **Loan Underwriting Requirements**

- a) An applicant must have the capacity to repay the loan under the requirements of the Trust Fund as set out in this policy. Applications will be evaluated based on credit and financial analysis of the applicant. Past performance or similar projects may be considered for this purpose.
- b) Debt Ratio: The applicant's total monthly debt to income ratio shall not exceed 50%. The Advisory Committee may make case by case exceptions with consideration of compensating factors.
- c) Credit Report: Credit history shall be reviewed by HCD to determine how the applicant has handled prior obligations. No loan shall be granted in the event that there are judgments or other liens, other than mortgage liens, encumbering the property.
- d) All ad valorem taxes on property owned by the applicant within the City of Tampa must be current.
- e) Property title must be clear with the exception of mortgage liens. HCD shall obtain a title binder prior to loan approval. Lender's Title Insurance must be obtained for all loans from the Trust Fund to protect the lender's interest in the property should a problem with title arise.
- f) Fund verification requires asset statements of at least six consecutive months.
- g) A property survey, no more than ten years old for same structure on survey, shall be provided.
- h) Total Encumbrances: In some cases the property may become over-encumbered when the Trust Fund loan is considered. In this event, the Trust Fund will consider this when determining the repayment period.
- i) When the project owner is a for-profit corporation, the Trust Fund shall require that a principal of that organization personally guarantee the mortgage.
- j) An appraisal of the property, to be paid for at the applicant's expense, may be requested by the Advisory Committee, at its discretion.

### **Loan Terms**

- a) Loans from the Trust Fund may not exceed \$200,000.00 per eligible project.
- b) The loan amount shall not exceed the cost of the approved work plus approved closing costs.
- c) The loan's repayment period will be based on the use of the property and the amount of the loan.
  - 1. If the loan amount is less than or equal to \$10,000.00, the repayment period shall be no longer than five (5) years.
  - 2. If the loan amount is more than \$10,000.00, the repayment period shall be based as follows:
    - i. For loans where the property use involves an owner-occupied, single family dwellings (or other program-eligible personal, family, or household uses) the repayment period shall be no longer than twenty (20) years.

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- ii. For all other program-eligible property uses (for example commercial or business uses), the loan type shall be a balloon mortgage consisting of a 5-year payment period with a 20-year amortization. The loan will come due at the end of the 5-year period at which time the applicant may then seek conventional or other financing to fully payoff the Trust Fund loan.
- d) The interest rate for all loans is discounted from the U.S. Prime Rate by 1% and is established by the Program administrator basing the calculation on the U.S. Prime Rate for the day which the application cycle is advertised. For the application cycle of **March 20, 2019**, the interest rate is **4.25%**. If the loan amount is more than \$10,000.00, it will be interest-only for the first six (6) months.

#### **Representative Repayment Terms For Owner-Occupied Single Family Dwellings (or other personal, family, or household Program-eligible purposes):**

- i. Example where the loan amount is less than or equal to \$10,000.00:  
A loan of \$10,000.00 for four (4) years at 4.250% annual percentage rate (APR) will have a monthly payment of \$226.91. The payment does not include taxes or insurance and the actual payment obligation will be higher. Your actual payment may also vary based on amount, term, taxes and insurance and other factors. All loans are subject to approval and eligibility requirements.
  - ii. Example where the loan amount is more than \$10,000.00:  
A loan of \$200,000.00 for twenty (20) years at 4.250% annual percentage rate (APR) will have a monthly payment of \$1,238.47 (Month 1-Year 20). Taxes and insurance not included and the actual payment obligation will be higher. Actual payment may also vary based on amount, term, taxes and insurance and other factors. All loans are subject to approval and eligibility requirements.
- e) No down payment is required at closing.
  - f) Servicing of loans shall be carried out by contractor(s) engaged by the City of Tampa. A servicing fee applies, estimated at \$65.00.
  - g) Escrow accounts shall be established and administered by contractor(s) engaged by the City of Tampa. An initial set-up fee applies, estimated at \$25.00. Draw amounts are limited to 20% of the total amount of the loan and will not be issued on delinquent accounts. A maximum of five (5) draws are allowed. Transfer fees apply, estimated at \$15.00 per draw.
  - h) In the event that the mortgagee requests changes to the original loan terms once approved, including refinancing, subordination of priority, or any other action requiring reconsideration by the Advisory Committee, a processing fee of \$300.00, in addition to all related fees, will be assessed prior to processing. Approval of the request is not guaranteed and fees are non-refundable in the event that the request is not granted.
  - i) If an historic property securing a Program loan is sold, the Program loan will be repaid at the time the sale is closed.

#### **Emergency Funding Requests**

In the event that an emergency situation occurs that poses an immediate threat to, or has resulted in the serious damage of, a historic building located in an eligible National Register District, a property owner may apply for emergency funding, in the form of a low-interest loan, through the Trust Fund loan program regardless of the application deadline. The Advisory Committee will determine if the scope of the application qualifies as an emergency situation and whether to authorize an emergency loan. The





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established Trust Fund loan program *Procedures and Standards* will otherwise remain applicable. Emergency loans will be made exclusively for the interim stabilization of a historic property and are not available for a comprehensive rehabilitation project unless otherwise determined to be necessary to the general preservation of the historic building. An application for an emergency loan will be deemed ineligible in the event that the Advisory Committee determines, in its sole discretion, that the property owner has compromised the integrity of the subject building or structure through intentional or willful neglect or misconduct.

For applications requesting an emergency loan, the Advisory Committee may:

1. Require that the applicant disclose the scope of protection provided under all contracts of property insurance and submit copies of the current insurance policies related to the subject property (i.e., property loss, fire, extended coverages, limitations and riders); and
2. Require that the applicant and the City of Tampa enter into an agreement that requires immediate repayment of the emergency loan upon receipt of proceeds from any and all property insurance policies in effect that relate to the subject property; and
3. At its sole discretion, determine an appropriate period for repayment of the emergency loan when unique circumstances exist that warrant an extension; and
4. At its sole discretion, determine the appropriate scope of work that is necessary to eliminate the threat and damages to the historic building for which the emergency loan is requested.

### **Compliance with the City of Tampa Ethics Code**

The applicant shall comply with all applicable governmental and city rules and regulations including the City's Ethics Code, which is available on the City's website (City of Tampa Code, Chapter 2, Article VIII. - Section 2-522). Moreover, each applicant to the Interstate Historic Preservation Trust Fund Loan Program acknowledges and understands that the City's Charter and Ethics Code prohibit any City employee from receiving any substantial benefit or profit out of any contract or obligation entered into with the City, or from having any direct or indirect financial interest in effecting any such contract or obligation. (City of Tampa Code, Chapter 2, Article VIII. - Section 2-514(d)).

Please note that the City's Ethics Code may be accessed on the Internet through the following website:  
[www.tampagov.net](http://www.tampagov.net)

Tampa's municipal codes are published online by the Municipal Code Corporation. Printed copies of the Ethics Code can be obtained from the City Clerk's Office for a fee of \$0.15 cents a page.