

AGENDA
HISTORIC LANDMARK COMMISSION CITY OF MANSFIELD, TEXAS COUNCIL CONFERENCE ROOM TUESDAY, JULY 24, 2018, 5:30 PM

1. **CALL TO ORDER**
2. **APPROVAL OF LAST MEETING MINUTES**
3. **OTHER AGENDA ITEMS:**
 - A. Approval of the Vision and Annual Preservation Goals for 2018 - 2019
4. **WORK SESSION:**
 - A. Historic Preservation Incentives Program
5. **COMMISSION ANNOUNCEMENTS**
6. **STAFF ANNOUNCEMENTS**
7. **ADJOURNMENT OF MEETING**

I certify that the above agenda was posted on the bulletin board next to the main entrance of City Hall on July 19, 2018, in accordance with Chapter 551 of the Texas Government Code.



Delia Jones, Secretary

- This building is wheelchair accessible. Disabled parking spaces are available. Request for sign interpreter services must be made 48 hours ahead of meeting to make arrangements. Call 817 473-0211 or TDD 1-800-RELAY TX, 1-800-735-2989.

**HISTORIC LANDMARK COMMISSION
CITY OF MANSFIELD**

June 19, 2018

Chairman Smith called the meeting to order at 5:30 p.m. in the City Council Conference Room of City Hall, 1200 East Broad Street, with the meeting being open to the public and notice of said meeting, giving date, place, and subject thereof, having been posted as prescribed by Chapter 551, Texas Government Code.

Present:

Robert Smith	Chairman
David Littlefield	Vice-Chairman
Mark Walker	Commissioner
Justin Gilmore	Commissioner
Cynthia Gardner	Commissioner
Lynda Pressley	Commissioner
Arnaldo Rivera	Commissioner

Absent:

Brent Parker	Commissioner
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Staff:

Art Wright	Planner
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Approval of Last Meeting Minutes

Chairman Smith called for approval of the minutes of the May 8, 2018, meeting. Commissioner Pressley made a motion to approve the minutes as presented. Commissioner Rivera seconded the motion which carried unanimously.

Work Session to Establish the Commission's Annual Preservation Goals for 2018 - 2019

Chairman Smith opened the discussion on the preservation goals to the Commissioners. Commissioner Rivera recommended that the Commission have a vision statement. Vice-Chairman Littlefield stated that he liked the process used for the Historic Mansfield Vision and Action Plan. After discussion, the Commission adopted the following as their vision statement:

"The Commission will work to preserve the past to promote the future."

The Commission then discussed setting goals for the upcoming year. Mr. Wright explained some of the state requirements for Certified Local Governments that might be used as goals. Commissioner Gilmore discussed the possibility of using the hotel/motel tax for historic preservation efforts.

After discussion, the Commission agreed on the following goals:

- 1) Identify and prioritize Mansfield's historic resources.
 - a) Identify high priority or endangered historic resources for preservation.
 - b) Work with the Tarrant County Historic Preservation Commission on updating the Historic Resources Survey as part of a county-wide effort.
- 2) Develop incentives for historic preservation in conjunction with the City Council.
 - a) Formulate a proposal for incentives such as tax abatements, low-interest loans, and grants to promote the restoration, rehabilitation and reuse of historic resources and discourage the demolition of these resources.
 - b) Hold a joint work session with the City Council to present the historic preservation incentive program and discuss funding mechanisms for the program.
- 3) Promote the work of the Historic Landmark Commission.
 - a) Produce an annual report of the Commission's activities to educate the public on the Commission's role and the need for historic preservation.

Chairman Smith directed Staff to schedule another work session in a month to discuss an incentives program to encourage preservation.

Commission Announcements

None

Staff Comments

None

Adjournment

With no further business, Chairman Smith adjourned the meeting at 6:50 p.m.

Robert Smith, Chairman

ATTEST:

Delia Jones, Secretary

HISTORIC LANDMARK COMMISSION COMMUNICATION

Agenda Date: July 24, 2018

Subject: Approval of the Vision and Annual Preservation Goals for 2018 - 2019

COMMENTS AND CONSIDERATIONS

At the work session held on June 19, 2018, the Commission discussed a vision and preservation goals for the next fiscal year from October 1, 2018, to September 30, 2019, of items the Commission would like to accomplish. At the Commission's direction, Staff has drafted the wording for the vision and goals for the Commission's approval:

- The Commission adopts the following vision to guide their work: "The Mansfield Historic Landmark Commission will work to preserve the past to promote the future."
- The annual preservation goals for the Commission for 2018 – 2019 are as follows:
 - 1) Identify and prioritize Mansfield's historic resources.
 - a) Identify high priority or endangered historic resources for preservation.
 - b) Work with the Tarrant County Historic Preservation Commission on updating the Historic Resources Survey as part of a county-wide effort.
 - 2) Develop incentives for historic preservation in conjunction with the City Council.
 - a) Formulate a proposal for incentives such as tax abatements, low-interest loans, and grants to promote the restoration, rehabilitation and reuse of historic resources and discourage the demolition of these resources.
 - b) Hold a joint work session with the City Council to present the historic preservation incentive program and discuss funding mechanisms for the program.
 - 3) Promote the work of the Mansfield Historic Landmark Commission.
 - a) Produce an annual report of the Commission's activities to educate the public on the Commission's role and the need for historic preservation.

The Commission may make any changes, modifications or deletion to the above goals the members see fit. A formal vote is necessary to adopt the proposed vision and goals.

HISTORIC LANDMARK COMMISSION COMMUNICATION

Agenda Date: July 24, 2018

Subject: Work Session on a Historic Preservation Incentive Program

COMMENTS AND CONSIDERATIONS

In preparation of the work session, Staff has compiled some information for the Commission's consideration in formulating a historic preservation incentive program for recommendation to the City Council:

- For tax incentives, an overview of historic tax preservation programs from the Texas Historical Commission, together with program details from Fort Worth, Galveston, Granbury, Plano, Tyler, and Waxahachie.
- For low interest loans, program details from San Antonio.
- For matching and/or façade grants, program details from Farmers Branch, Fort Worth, Grapevine, Keller, Killeen and Victoria.

Attachments

Historic Preservation Tax Incentive Programs

Low Interest Loan Programs

Grant Programs

Historic Preservation Tax Incentives

- Overview on Tax Incentive Programs from the Texas Historical Commission
- Program details from:
 - Fort Worth
 - Galveston
 - Granbury
 - Plano
 - Tyler
 - Waxahachie

Local Tax Incentive Programs for Historic Preservation



INCENTIVES USED BY CLGs

Does the CLG offer any local incentives to support historic preservation projects?



! DEFINITIONS

Ad Valorem- “according to value”; also known as **property taxes**

Property Tax Exemptions- “...a partial exemption removes a percentage or a fixed dollar amount of a property’s value from taxation.”
[comptroller.texas.gov]

Property Tax Abatements- “A local agreement between a taxpayer and a taxing unit that exempts all or part of the increase in the value of the real property and/or tangible personal property from taxation for a period not to exceed 10 years.” [comptroller.texas.gov]

Tax Freeze- Tax Ceiling [comptroller.texas.gov]; however, sometimes the term “freeze” is used when describing exemptions and abatements

! ENABLING LEGISLATION

Texas Tax Code 11.24

To qualify for the historic or archaeological site exemption, a structure must be designated a historic building or archeological site and the taxing unit must vote to grant an exemption. The structure **must be designated as a Recorded Texas Historic Landmark by the THC or the taxing unit must designate it as historically significant and in need of tax relief.** The taxing unit decides the amount of the exemption.

Texas Tax Code Chapter 312

Legislation does not mention historic properties specifically.

Tax abatements are an economic development tool available to cities, counties, and special districts to attract new industries and to encourage the retention and development of existing businesses through property tax exemptions. (comptroller.texas.gov)

! INCENTIVES USED BY CLGs

Tax incentives for Rehabilitation

A tool to incentivize property owners to undertake a quality rehabilitation by reducing property tax liability, typically for a set amount of time.

Tax incentives for Maintenance

A tool to incentivize property owners to properly maintain their property by reducing property tax liability. Typically, property owners must re-apply each year.



! THE BENEFITS

Why are tax exemptions and abatements effective?

- Extends the life of the building
- Encourages quality design
- Proactive vs. reactive
- Ability to target endangered areas
- Doesn't require city investment upfront
- Will eventually increase city revenues
- Sends the right message





TEXAS HISTORICAL COMMISSION

real places telling real stories

thc.texas.gov

HISTORIC PRESERVATION TAX INCENTIVE PROGRAMS

Updated August 2017

Tax Incentives for Rehabilitation

AUSTIN

Contributing properties in Austin's locally-designated historic districts are eligible to receive a tax abatement for qualified historic rehabilitation. The property owner must spend a minimum amount on rehabilitation work including a certain percentage spent on the exterior in order to qualify. The project must be approved by the Austin Historic Landmark Commission with a Certificate of Appropriateness, and city staff will inspect the project at completion to certify compliance. Once the project is certified, the city abates 100% of the city property taxes assessed on the added value of the property for either 7 or 10 years, depending on the location and use of the property.

https://www.austintexas.gov/sites/default/files/files/Planning/Historic_Preservation/lhd_tax_abatement_application.pdf

Austin also offers tax incentives to owners of local historic landmarks. Properties that are owner occupied may be exempt from 100% of the value of the structure and 50% of the value of the land for the city and county portion of the property tax. The school district will exempt 50% of the value of the structure and 25% of the value of the land.

Income-producing local landmarks are eligible for an exemption at half the percentages as an owner-occupied residence (i.e. 25% and 12.5%).

For newly-designated owner occupied landmarks, there is a cap of \$8,500 (\$2,500 by the city and county and \$3,500 by the school district). All property owners seeking the tax exemption must file an annual application with the appraisal district and an affidavit with the city stating the reason they are seeking the tax relief pursuant to the Texas Tax Code.

DALLAS

Tax exemption program for rehabilitating historic structures. The amount of tax exemption depends on the type of property and how much the person invests in the property. Only properties designated as a City of Dallas historic landmarks and properties contributing to a historic district are eligible. The types of exemptions are broken up into four areas: endangered historic districts, urban historic districts, revitalizing historic districts, and all other areas. These areas determine the minimum required expenditure to be eligible.

http://dallascityhall.com/departments/sustainabledevelopment/historicpreservation/Pages/tax_incentives.aspx

Type of Exemption:

Please ask staff which category of exemption you may qualify to receive.

Category		Type	Required Expenditures (% of pre-rehab value of structure only)	Amount (portion of land and structure)	Duration	Renewable (façade expenditures only)
Urban Historic Districts Includes all properties located within the Urban historic district area shown on the last page of this packet	☐	Based on Rehab	75%	100%	10 years	Yes
	☐	Based on Rehab	50%	Added Value	10 years	Yes
	☐	Residential / ground floor conversion	50% must be converted to residential and 65% of ground floor must be converted to retail	100%	5 years	No
Revitalizing Historic Districts Includes properties located in: • Junius Heights • Lakeliff • Peak's Suburban • South Blvd. / Park Row • Winnetka Heights	☐	Based on Rehab	25%	100%	10 years	Yes
Endangered Historic Districts • 10 th Street • Wheatley Place	☐	Based on Rehab	25%	100%	10 years	Yes

Citywide Includes properties located in: • Munger Place • State Thomas • Swiss Avenue • All properties not located within the Urban, Endangered, or Revitalizing historic districts	☐	Based on Rehab	50%	Added Value	10 years	Yes
	☐	Endangered Property (Landmark Commission must find that this property is endangered.)	25%	100%	10 years	Yes
Citywide – maintenance	☐	Maintenance	3%	Added Value	3 years	Yes
Ownership by a non-profit entity open to the public	☐	Non-profit	Be a contributing structure in the district, and be a designated historic landmark that is open to the public and is operated by a non-profit with 501(c)(3) status. See Sec 51A-11.207 for other requirements	100%	As long as the building is owned by a non-profit entity and is open to the public	Annually

PLEASE NOTE: All tax exemption approvals that accumulatively (new applications and renewals) will receive exemptions totaling in excess of \$50,000 will have to be approved by both the Landmark Commission and the City Council.

FORT WORTH

Fort Worth's tax exemption requires that an amount equal to or greater than 30% of the assessed valuation of the improvements be spent on rehabilitation. The program freezes the assessed valuations of the land and improvements at the pre-rehabilitation values for the purposes of assessing city taxes. The exemption period is ten (10) years.

<http://fortworthtexas.gov/planninganddevelopment/historic-preservation/tax-exemption/>

HOUSTON

City of Houston Landmarks, Protected Landmarks, or buildings that have been classified as “contributing” or “potentially contributing” within a Historic District qualify for the tax exemption. The rehabilitation must amount to at least 25% of the assessed value of the improvements on the land. The percentage of the tax exemption (from 25% up to 100%) is dependent on the amount of qualified expenditures relative to the pre-rehabilitation value. The tax exemption applies to the tax on the improvement only, not the land, for up to 15 years. The exemption only applies to the City of Houston taxes.

The City of Houston also offers a tax exemption for “significant” historic buildings. The building must have more than four residential units and originally built and used for non-residential purposes. The significant historic building may be exempted from city ad valorem taxes for both improvements and land, up to \$30,000 per year in perpetuity.

<http://www.houstontx.gov/planning/HistoricPres/hist-incentives-broch.pdf>

MCALLEN

Currently, the City of McAllen offers an exemption from the annual city ad valorem taxation to incentivize local designation, proper maintenance, and rehabilitation of historic properties. The incentive program also ensures that property owners comply with the requirements of the Certificate of Appropriateness process.

To encourage regular maintenance, local landmarks may apply for a tax exemption in perpetuity equal up to 50% of the assessed value of the historic structure and the land. While properties designated at the federal or state level qualify for an exemption equal up to 100% of the assessed value of the structure and land.

The City also incentivizes historic rehabilitation. Heritage Properties, which are defined as properties that are at least 50 years old but are not listed as local landmarks, qualify for an ad valorem tax exemption equal to 100% of the increase in the assessed value post rehabilitation. The exemption is good for 10 years. Similarly, properties located in a local historic district may apply for an ad valorem tax exemption for 5 years equal to 100% of any increase to the assessed value post rehabilitation.

https://library.municode.com/tx/mcallen/codes/code_of_ordinances?nodeId=PTIICOORSUGEOR_C_H98TA_ARTIADVATA_DIV3HIPR

NEW BRAUNFELS

Locally designated landmarks are eligible to receive tax exemptions for rehabilitation which represents at least 10% of the value of the property and which improvements extend the life of the structure. The *pre-rehabilitation value* is used to calculate the city’s ad valorem tax for five years. In the fourth year of the relief, the applicant may apply to have the relief extended for an additional five years.

In addition to tax exemptions for rehabilitation, the City of New Braunfels offers a 20% reduction in city assessed ad valorem taxes for properties located within a locally designated historic district.

<http://www.nbtexas.org/1091/Benefits>

SAN ANTONIO

A local tax exemption is available for designated local landmarks and properties within local historic districts that undergo a substantial rehabilitation. Following the rehabilitation, city property taxes are frozen at the assessed value prior to the rehabilitation for ten years. Commercial properties that undergo a substantial rehabilitation are eligible for the 5 zero/5 fifty tax exemption. This exemption means no city property taxes are owed for the first five years, and for the next five years the city taxes are assessed at 50% of a post-rehabilitation appraisal.

San Antonio also offers a tax exemption for owner-occupied residences in new historic districts. All residential properties occupied by the property owner in newly designated local historic districts at the time of designation receive a 20% exemption on their city property taxes for ten years. The exemption can be extended for an additional five years.

<http://www.sanantonio.gov/historic/Programs/incentives>

ABILENE

Tax exemptions are available for the rehabilitation of structures located within a local historic district. The city compensates the property owner for all or part of the eligible costs of rehabilitation by reducing the owner's city property taxes for a period of up to 10 years. The exemption equals 50% of the increased value of a structure after an approved rehabilitation project. Rehabilitation costs must exceed \$750.

In addition to the tax exemption for rehabilitation, the city offers an annual property tax exemption of \$200 or 20% (whichever is greater) for all properties located within a local historic district.

<http://abilenetx.com/home/showdocument?id=7043>

GALVESTON

The city offers three different types of tax incentives. (1) all properties in newly designated historic districts receive a 35% exemption on their city property taxes for five years. The exemption is also available for newly designated Galveston Landmarks located outside of historic districts. (2) all properties in newly designated conservation districts receive a 25% exemption on their city property taxes for five years. (3) local landmarks and properties located within a local historic district are eligible to receive a tax exemption for a rehabilitation that costs equal or more than 50% of the improvement value. City property taxes are assessed at the pre-rehabilitation value for ten years.

<http://www.galvestontx.gov/DocumentCenter/View/3221>

TYLER

The city offers a tax exemption for rehabilitation in the amount equal to 100% of any increase in the assessed value for the purposes of ad valorem taxes levied by the City of Tyler for a period of five (5) years following issuance of a Certificate of Appropriateness and provided the property maintains its landmark status.

The city also allows for 50% of the assessed value (up to \$2 million) of any building listed on the Tyler Historic Landmark Register to be exempt from annual city ad valorem taxation provided that the property maintains its local landmark status.

<http://www.cityoftyler.org/Departments/HistoricPreservation/HistoricTaxAbatementCredits.aspx>

PARIS

Historically significant sites are eligible to receive a tax exemption equal to 100% of any increase in assessed value after a substantial rehabilitation for a period of seven years. Rehabilitation must cost \$5,000 or more for residential, and \$10,000 for commercial. Only work on the exterior will be eligible.

In addition to the tax exemption for rehabilitation, historically compatible new construction shall be exempted, for a period of three years, 100% of any increase in the assessed value.

<https://www.paristexas.gov/index.aspx?NID=305>

WAXAHACHIE

Waxahachie offers an exemption of 25% of the assessed value of the property, not to exceed \$25,000 for designated city landmarks which are in full compliance with city regulations, including adherence to decisions of the Waxahachie Historic Preservation Commission. The exemption applies to both residential and commercial properties. Applications for the tax exemption must be filed every year.

Waxahachie also offers a rehabilitation exemption of up to 50% of the total property tax bill for rehabilitation amounting to at least \$1,250 in improvements to a property designated at the city, state, or federal level. The Waxahachie Historic Preservation Commission oversees all restorations under this incentive program. The applications must be filed annually.

<http://www.waxahachie.com/Departments/HeritagePreservation>

ENNIS

Landmarked structures are eligible for a property tax exemption of 25% of the assessed value of the property, not to exceed \$25,000. Non-residential structures in the designated historic downtown district may receive a re-investment tax abatement equal to the amount of rehabilitation completed within a calendar year, with a cap set at the annual tax liability of the property.

<http://ennistx.com/downtown-incentives>

WACO

Any property which has been designated as a historic landmark shall qualify for an exemption of City ad valorem taxes, provided that the historic landmark has been determined by the City Council to be a historically or archaeologically significant site in need of tax relief to encourage its preservation. The tax exemption shall exempt from city ad valorem taxation any increase in the assessed value of the building or structure and the land necessary for access and use of the building/structure following the designation by the City Council for a period of 10 years.

<http://www.waco-texas.com/planning-hlpc-information.asp#incentives>

SEGUIN

Properties located in the downtown historic district which undergo a substantial rehabilitation (spending \$2,000-\$500,000) may be exempt from taxation on the increase in value following rehabilitation for up to five years. Rehabilitations which cost more than \$500,000 may be exempt from the increase in value following rehabilitation for up to ten years.

Owners of Recorded Texas Historic Landmarks located in Seguin are eligible to receive a tax exemption equal to the amount they have spent in the year on maintaining the property.

Documentation verifying the expenses must be provided, and owners must apply each year.

http://www.seguintexas.gov/departments/main_street/historic_preservation.php

GRANBURY

Residential structures that have been designated as local historic landmarks are eligible for an exemption up to 100% of the city's ad valorem tax assessed on the structure for a period of 10 years.

In addition, rehabilitation equal to \$40,000 or more to residential structures located within the historic neighborhood improvement zone are eligible to receive up to a 70% exemption of the city's ad valorem tax for the structure for a period of 10 years. Also, minor interior or exterior improvements equally \$15,000 or more to residential structures located within the historic neighborhood improvement zone may receive up to 40% exemption of the city's ad valorem tax for the structure for a period of 10 years.

<http://www.granbury.org/index.aspx?NID=634>

KILLEEN

Commercial and multifamily units are eligible to receive a tax exemption on the added value of a property after a rehabilitation for up to five years. Rehabilitation must equal at least 25% of the assessed value.

<http://www.killeentexas.gov/index.php?section=310>

KINGSVILLE

Properties designated at the federal, state, or local level may apply to the city for municipal ad valorem tax relief based on rehabilitation expenses.

<http://www.cityofkingsville.com/departments/planning-and-development-services/community-appearance-grants/>

MOUNT VERNON

Property will be taxed on the pre-rehabilitation value for up to 10 years after a rehabilitation of a historic, commercial building.

<http://www.comvtx.com/default.aspx?name=economic.development>

PALESTINE

Tax relief is given to property owners who undertake a rehabilitation. Relief period is up to five years.

<http://www.cityofpalestinetx.com/users/OldFiles/upload/Historic%20Property%20Handbookpdf.pdf>

Maintenance Only Tax Incentives

UVALDE

The City of Uvalde and Uvalde County grant a 25% exemption of the assessed value for properties listed on the National Register or designated an RTHL. City landmarks are eligible for city tax exemption only. The exemption was created to encourage proper maintenance of historic structures; therefore, maintenance standards are verified.

<http://www.uvaldetx.com/content/historic-preservation>

ROUND ROCK

Historically-significant residential and commercial property owners may receive a 75% exemption of municipal property taxes. The program encourages properties to use money saved on taxes to provide

regular maintenance and/or repair to their historic structures.

<https://www.roundrocktexas.gov/departments/planning-and-development-services/historic-preservation/historic-tax-exemption/>

BROWNSVILLE

Properties listed on the National Register or designated as an RTHL are exempted from all ad valorem taxation by the city.

Properties designated as a primary resource are granted an ad valorem tax exemption equal to 50% of the gross assessed value of the site.

https://library.municode.com/tx/brownsville/codes/code_of_ordinances?nodeId=PTIICOOR_CH348_ZO_ARTIXHIPRURDE

PLANO

Plano's tax exemption program offers a full or partial exemption based the designation and use of the property. See table below. The money saved by participating in the program is meant to be used by the participant to make improvements and repairs to the structure. Exemptions apply to the improvements only, not the land. <http://www.plano.gov/2737/Tax-Exemption-Program>

Class A Structures - Structures occupied exclusively for residential purposes and individually designated as a local historic resource could potentially receive a 100% exemption.

Class B Structures - Structures occupied in whole or in part for purposes other than residential and individually designated as a local historic resource could potentially receive a 50% exemption.

Class C Structures - Structures occupied exclusively for residential purposes and noted as a contributing resource in a locally designated historic district could potentially receive a 75% exemption.

Class D Structures - Structures occupied in whole or in part for purposes other than residential and noted as a contributing resource in a locally designated historic district could potentially receive a 38% exemption.



HISTORIC SITE TAX EXEMPTION APPLICATION

HISTORIC AND CULTURAL LANDMARKS COMMISSION

CITY OF FORT WORTH, TX 76102

200 TEXAS STREET

(817) 392-8574 / Fax: (817) 392-8016

2018 Application Deadline HCLC Meeting Dates
December 18 January 8
January 16 February 12
February 19 March 12
March 19 April 9
April 16 May 14
May 21 June 11

2018 Application Deadline HCLC Meeting Dates
July 10 June 19
July 16 August 13
August 20 September 10
September 17 October 8
October 15 November 12
November 19 December 10

How do I obtain the Historic Site Tax Exemption?

The Historic Site Tax Exemption (HSTE) involves a two-part process that requires approval by the HCLC and the City Council before the project is started, and final verification by the HCLC and the City Council upon completion of the project. The Tax Exemption will go into effect January 1st of the year following City Council verification. The Tax Exemption freezes the taxable ceiling of the land and improvements at the pre-renovation values for the purpose of assessing City of Fort Worth taxes. The exemption period is ten (10) years. Application to the Tarrant Appraisal District must be made by the property owner each year of the exemption.

Eligibility for the Tax Exemption requires that an investment equal to or greater than 30% of the assessed valuation of the improvements be spent on rehabilitation. The HCLC must approve all work requiring a Certificate of Appropriateness in advance. Work, which does not require a Certificate of Appropriateness, may be counted toward the investment up to five years after the expenditure with appropriate receipts. Please contact the Historic Preservation Officer for more information.

Step 1: Partial Approval

Upon submission of the completed application, the item will be placed as a public hearing action item on the next scheduled HCLC meeting. Incomplete applications will not be accepted or forwarded to the HCLC for action. Please see the HSTE page of the application for required documentation. Upon approval by the HCLC, your application will be forwarded to the City Council for action.

Step 2: Verification

Upon completion of the stabilization or rehabilitation project, the applicant shall return the documents listed on the HSTE page of the application to the HCLC for verification. If the verification of completion is favorable, the HCLC shall forward your application to the City Council for verification approval. Once verified, City staff notifies the Tarrant Appraisal District of the tax exemption to begin on January 1 of the following year.

If the verification of completion is unfavorable, you shall be required to complete the project in order to secure the HSTE; your application will be returned for consideration of approval after all work has been completed.

NOTE: Upon verification of the HSTE, a signed and notarized copy of the City of Fort Worth form "Notice of Historic Site Tax Exemption" shall be filed in the office of the Tarrant County Clerk before the City shall grant the HSTE.

ACKNOWLEDGEMENTS

I certify that the above information is correct and complete to the best of my knowledge and ability and that I am now or will be fully prepared to present the above application to the Historic and Cultural Landmarks Commission public hearing. I understand that if I am not present or represented at the public hearing, the Landmarks Commission may continue or disapprove/deny the application. I authorize members of the Landmarks Commission and officers of the city to visit and inspect the property.

I understand that there are two steps to receiving the Historic Site Tax Exemption. The first step is submitting the Historic Site Tax Exemption and Certificate of Appropriateness applications to the Landmarks Commission prior to starting rehabilitation. I understand that required permits and inspections must be obtained from the Development Department. The second step in receiving the tax exemption occurs upon completion of the project. I am responsible for submitting the required documentation to the Planning Department for verification of the project's completion by the Landmarks Commission and the City Council.

I agree to provide any additional information necessary for determining eligibility as requested by the Planning Department, the Landmarks Commission or City Council.

Owner/Agent: _____ Date: _____

Si necesita un traductor, por favor marque aqui _____. Se proporcionara un traductor sin costo para usted.



HISTORIC SITE TAX EXEMPTION APPLICATION

HISTORIC AND CULTURAL LANDMARKS COMMISSION

CITY OF FORT WORTH, TX 76102 200 TEXAS STREET

(817) 392-8574 / Fax: (817) 392-8016

HISTORIC PROPERTY

Street & Number: _____

Zoning: ____ HSE (Highly Significant Endangered) ____ HC (Historic & Cultural Landmark)

PROPERTY OWNER / AGENT

Owner's Name: _____ Phone Number: _____

Mailing Address: _____ Email: _____

City: _____ State: _____ Zip Code: _____

Agent (if any): _____ Phone Number: _____

Street & Number: _____ Email: _____

City: _____ State: _____ Zip Code: _____

PROJECT INFORMATION

Required 30% Expenditure \$ _____ Estimated Expenditures \$ _____

Projected Completion Date _____ / _____ / _____

REQUIRED DOCUMENTS WITH HSTE APPLICATION

- | | |
|---|---|
| ☐ Project description | ☐ Signed application |
| ☐ Statement of costs equal to or exceeding 30% of the improvements value | |
| ☐ Photographs of current conditions | |

REQUIRED DOCUMENTS UPON COMPLETION OF HSTE WORK

- | | |
|--|--|
| ☐ Copies of all receipts for eligible project costs | ☐ Proof that a Certificate of Occupancy has been issued (if applicable) |
| ☐ Proof of final inspection by the Development Department | ☐ Photographs of finished project |
| | ☐ Signed application |

DESCRIPTION OF WORK

Please describe in detail the work you intend to complete. If necessary, continue on an additional sheet. _____



City of Galveston

Financial Incentives for Historic Properties

- New program to encourage rehabilitations of historic buildings
- Also encourages designation of new historic districts and Galveston Landmarks
- Tax exemptions are transferrable if the property is sold
- Landmark Commission must certify the rehab work before any work begins
- City Council must approve the tax exemption after review by the Landmark Commission
- The state and federal governments also offer tax incentive programs for historic properties – contact the Texas Historical Commission at 512-463-6100 for more information

CONTACT:

Catherine Gorman, AICP
Historic Preservation Officer
409-797-3665
cgorman@galvestonTX.gov

LOCAL TAX EXEMPTION FOR NEW HISTORIC DISTRICTS AND GALVESTON LANDMARKS

All properties in newly designated historic districts receive a 35% exemption on their City property taxes for five years. The tax exemption is also available for newly designated Galveston Landmarks located outside of historic districts. The tax exemption remains with the property regardless of change of ownership or sale of the property.

LOCAL TAX EXEMPTION FOR NEW NEIGHBORHOOD CONSERVATION DISTRICTS

All properties in newly designated New Conservation Districts receive a 25% exemption on their City property taxes for five years. The tax exemption remains with the property regardless of change of ownership or sale of the property.

LOCAL TAX EXEMPTION FOR SUBSTANTIAL REHABILITATION

A tax exemption is available for designated local landmarks and properties within local historic districts that undergo a substantial rehabilitation. Substantial rehabilitation is defined as 50% of the improvement value according to the Galveston Central Appraisal District. Qualifying work should extend the life of a building such as:

- Roofing
- Foundations
- Siding
- Electrical
- Plumbing
- HVAC systems
- Structural work
- Interior work
- Energy Efficiency improvements.

Following substantial rehabilitation of the property, City property taxes are frozen at the assessed value prior to rehabilitation for ten years. The tax exemption remains with the property regardless of change of ownership or sale of the property. Certain restrictions apply, and the tax exemption for Substantial Rehabilitation requires Certification by the Landmark Commission prior to commencement.

Comparison of Federal, State and Local Historic Tax Incentive Programs

Incentive applies to	Federal - 20%		State		Local		Local - 380 Agreement	
	Federal Income Tax - tax credit	Federal Franchise Tax - tax credit	Texas Franchise Tax - tax credit	City taxes - tax exemption	City taxes - tax exemption	City taxes - tax exemption; Sales Tax Rebate; Permit and LTU Fees	City taxes - tax exemption; Sales Tax Rebate; Permit and LTU Fees	City taxes - tax exemption; Sales Tax Rebate; Permit and LTU Fees
Amount of Incentive	20% of qualified expenditures	25% of qualified expenditures	25% of qualified expenditures	Tax freeze	Tax freeze	Varies - 25% to 75% of qualified expenditures	Varies - 25% to 75% of qualified expenditures	Varies - 25% to 75% of qualified expenditures
Recipient	Current owner(s)	Current owner(s)	Current owner(s). May transfer whole or partial credit to others	Current owner(s). Can be transferred upon sale of the property	Current owner(s). Can be transferred upon sale of the property	Current owner(s)	Current owner(s)	Current owner(s)
Eligible applicants	Individuals, companies, partnerships	Individuals, companies, partnerships	Individuals, companies, partnerships, non-profits and government entities	Individuals, companies, partnerships	Individuals, companies, partnerships	Individuals, companies, partnerships	Individuals, companies, partnerships	Individuals, companies, partnerships
Eligible building uses	Income-producing only	Income-producing only	Income-producing only	Any	Any	Any	Any	Any
Required historic designations	National Register (individual or district)	National Register (individual or district)	National Register (individual or district), Registered Texas Historic Landmark, or State Antiquities Landmark	Contributing property in local historic district, or Galveston Landmark	Contributing property in local historic district, or Galveston Landmark	None	None	None
Minimum project	\$5,000 or value of building (whichever is greater)	\$5,000	\$5,000	50% of assessed value per Galveston CAD	50% of assessed value per Galveston CAD	Not project based	Not project based	Not project based
Application structure	3-part Federal application	3-part application that mirrors Federal	3-part application that mirrors Federal	2-part application, issued by City Council	2-part application, issued by City Council	Designation application must be approved by City Council	Designation application must be approved by City Council	Designation application must be approved by City Council
Recapture period	5 years	none	none	none	none	none	none	none
Time limit	20 years to use credit	5 years to use credit	5 years to use credit	10 years	10 years	20 years	20 years	20 years
Architectural oversight	National Park Service (NPS) certifies with THC's recommendation	Texas Historical Commission. NPS reviews first if applying for Federal and State	Texas Historical Commission. NPS reviews first if applying for Federal and State	Landmark Commission	Landmark Commission	None	None	None
Financial oversight	Credit managed by IRS	Credit managed by Texas Comptroller	Credit managed by Texas Comptroller	Galveston Central Appraisal District	Galveston Central Appraisal District	Galveston Central Appraisal District	Galveston Central Appraisal District	Galveston Central Appraisal District
Application deadline	Must apply before project completion	Projects completed between September 1, 2013 and January 1, 2015 may apply retroactively. All others must apply before project completion.	Projects completed between September 1, 2013 and January 1, 2015 may apply retroactively. All others must apply before project completion.	Must apply prior to project commencement	Must apply prior to project commencement	Application accepted monthly	Application accepted monthly	Application accepted monthly
Applications accepted	Any time	Any time	Any time	Any time	Any time	Any time	Any time	Any time
Contact	Texas Historical Commission	Texas Historical Commission	Texas Historical Commission	City of Galveston, Historic Preservation Officer	City of Galveston, Historic Preservation Officer	City of Galveston, Historic Preservation Officer	City of Galveston, Historic Preservation Officer	City of Galveston, Historic Preservation Officer
	www.thc.state.tx.us 512-463-6100	www.thc.state.tx.us 512-463-6100	www.thc.state.tx.us 512-463-6100	www.galvestonTX.gov 409-797-3665	www.galvestonTX.gov 409-797-3665	www.galvestonTX.gov 409-797-3665	www.galvestonTX.gov 409-797-3665	www.galvestonTX.gov 409-797-3665

City of Galveston
Development Services Department
www.galvestonTX.gov

ORDINANCE NO. 07-234

AN ORDINANCE AMENDING CHAPTER 3, "BUILDING REGULATIONS" OF THE GRANBURY CITY CODE (2004), AS AMENDED BY ADDING NEW ARTICLES 3.18 RELATING TO A HISTORIC NEIGHBORHOOD IMPROVEMENT ZONE (HNIZ) PROGRAM AND 3.19 RELATING TO A NEIGHBORHOOD EMPOWERMENT ZONE (NEZ); AMENDING ORDINANCE NO. 01-819, AS AMENDED, THE ZONING ORDINANCE OF THE CITY OF GRANBURY, TEXAS, RELATIVE TO THE HISTORIC PRESERVATION COMMISSION'S AUTHORITY TO MAKE RECOMMENDATIONS WITHIN THE HISTORIC NEIGHBORHOOD IMPROVEMENT ZONE (HNIZ) PROGRAM; PROVIDING THAT THIS ORDINANCE SHALL BE CUMULATIVE OF ALL ORDINANCES; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the City of Granbury City Council has embraced programs to benefit owners who desire to invest in the City's diverse housing mix in historic, central Granbury; and

WHEREAS, the City of Granbury has adopted a philosophy to adopt ordinances tailored to preserve the City's unique and historic character of residential neighborhoods while encouraging property owners to maintain and/or rehabilitate their historic residences; and

WHEREAS, Article 8, Section 1-f of the Texas Constitution and Section 11.24 of the Texas Tax Code enable the City of Granbury to exempt from taxation part or all of the assessed value of certain historically significant sites in need of tax relief to encourage their preservation; and

WHEREAS, the City of Granbury desires to initiate a program to raise awareness and value of historic preservation through economic initiatives for the affected areas; and

WHEREAS, the City of Granbury finds that such tax relief is needed to encourage the preservation of historic residential structures within a defined geographic area, termed the Historic Neighborhood Investment Zone (HNIZ); and

WHEREAS, the City of Granbury also finds that such tax relief will provide economic incentive to restore, rehabilitate, and preserve historic homes within the HNIZ; and

WHEREAS, the Granbury Historic Preservation Commission has requested City Council consideration of a program wherein owners of residential property within the HNIZ may receive tax exemptions based on verified investments meeting specified criteria; and

WHEREAS, the City Council is of the opinion that the HNIZ program should be implemented allowing for an exemption of ad valorem taxes for residential property owners within the HNIZ who qualify for and meet the requirements of the program; and

WHEREAS, the City Council finds that the creation of a Neighborhood Empowerment Zone (NEZ) overlay of the area comprising the HNIZ program will help promote rehabilitation of affordable housing and foster economic development in the NEZ; and

WHEREAS, the City Council finds that the creation of a NEZ will benefit the citizens of the City, by increasing the public health, safety, and welfare of the citizens and that this area meets the requirements of Section 312.202, Tax Code as a reinvestment zone.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF GRANBURY, TEXAS, THAT:

Section 1.

All of the above premises are found to be true and correct and are incorporated into the body of this Ordinance as if copied in their entirety.

Section 2.

Chapter 3, Building Regulations, of the Code of Ordinances –of the City of Granbury, Texas, is hereby amended by adding Articles 3.18 and 3.19, which shall read as follows:

ARTICLE 3.18 HISTORIC NEIGHBORHOOD IMPROVEMENT ZONE

Sec. 3.18.001 Purpose

A Historic Neighborhood Improvement Zone (“HNIZ”) is hereby created for the purpose of preserving the City’s unique and historic neighborhoods while encouraging property owners to maintain and/or rehabilitate their residences. The HNIZ shall generally be encompassed by the area in the graphic labeled Exhibit A attached hereto.

Sec. 3.18.002 Historic Neighborhood Improvement Zone Program

A Historic Neighborhood Improvement Zone Program (“Program”) is created wherein owners of residential properties located in the defined geographic HNIZ may receive tax exemptions based on verified investments meeting specified criteria or maintaining a landmarked structure. Moving a landmarked residential structure onto a site within the HNIZ qualifies as a verified investment. Additionally, any landmarked structure recognized by the Historic Preservation Commission for its historic contribution which is located either within or outside of the HNIZ may also be considered for the Program. This Program consists of three (3) levels of participation and corresponding tax exemptions. Only habitable residential structures are eligible for exemption.

- (a) Level 1: Residential structures which have received the designation of a City of Granbury Historic Marker by the Granbury Historic Preservation Commission and which may be located within or outside the HNIZ may be eligible for an exemption of up to 100% of the City’s ad valorem taxes for the assessed value of the structure for a period of 10 years. The process and criteria for receiving the Historic Marker designation are as follows:
- (1) *Purpose: The purpose of the Marker Program is to encourage owners of historic properties to become actively involved in the preservation of Granbury’s historic past through the recognition of historic events, people, and architecture.*
 - (2) *The marker, if existing or awarded, would allow the owner of the building to apply for a tax incentive provided the building has been rehabilitated/restored according to the Secretary of the Interior’s Standards and is being properly maintained in a manner in which the structure is both structurally sound and visually pleasing.*

- (3) *The following are minimum, general requirements that would have to be submitted or met to obtain a marker:*
 - (A) *Written documented history.*
 - (B) *The building must be a minimum of 50 years of age.*
 - (C) *The house must be located within or outside the HNIZ.*
 - (D) *Photo documentation of all four elevations using B&W photos with negatives, color slides, and copies of any available historic photographs.*
 - (E) *Legal description of the property with a location map.*
 - (F) *Site plan of the property.*
 - (4) *The application shall be reviewed by the Historic Preservation Officer for completeness. The Historic Preservation Officer may ask for additions or revisions to the documentation if necessary. Once the application is completed, the Historic Preservation Officer will send a staff report to the Historic Preservation Commission for recommendation to the City Council regarding the historic marker application.*
 - (5) *If awarded, the owner may purchase and display the marker.*
 - (6) *If the marker is either existing or has been approved in a manner prescribed by adopted policy, the applicant may make an application for a tax incentive provided the building has architectural integrity and has been properly rehabilitated/restored and maintained.*
- (b) Level 2: Owners of residential structures 50 years old or older and located within the HNIZ shall submit plans for major exterior or structural improvements on residential structures to the Historic Preservation Officer.
- Examples of major exterior or structural improvements under Level 2 include: foundation repair, original frame and beam repair, restoration of historic porches and roof replacement associated with structural work or major rehabilitation projects.*

Only projects that retain or restore the historic integrity of the home through the use of proper materials and design, as determined by the Historic Preservation Commission may qualify for the incentive.

The submission by the applicant shall include an itemized listing of the type and cost of each improvement to the structure as required herein. The owner may then receive a Letter of Eligibility if the improvements qualify for the Program as determined by the City. Thereafter, owners who make verified exterior improvements, including but not limited to foundation, frame and roof repair may receive an exemption of up to 70% of the City's ad valorem taxes for the structure for a period not to exceed 10 years provided the repairs:

- (1) are consistent with applicable codes, both historic district and building codes, as applicable;
- (2) are completed within an 18-month period beginning with receipt of a Letter of Eligibility; and

- (3) have a combined cost in excess of \$40,000 but no greater than the assessed value of the structure on the date of receipt of a Letter of Eligibility.

Owners may submit additional applications under Level 2 during any period of exemption provided that the application meets the specified criteria of this ordinance. If such applications are approved, the exemption period shall be extended from the date of the last approval. In such event, the exemption periods run concurrently until the earliest approval expires and continues until the latter approval expires.

- (c) Level 3: Owners of residential structures 50 years old or older and located within the HNIZ shall submit plans for minor improvements to the Historic Preservation Officer and to the Building Permits department of the City. The owner may then receive a Letter of Eligibility if the improvements qualify for the Program as determined by the City.

Examples of minor improvements under Level 3 include: restoration and replacement of siding, windows and/or doors (painting included), plumbing, electrical, exterior painting, and other enhancements to elements such as louvers and architecturally significant features to the original structure, such as columns, awnings, canopies, shutters, and roof drainage systems.

Only projects (with the exception of building code compliance, plumbing, electrical, HVAC, etc.) that retain or restore the historic integrity of the home through the use of proper materials and design, as determined by the Historic Preservation Commission may qualify for the incentive.

Owners who make verified exterior improvements (roof, windows, siding, plumbing, electrical, etc.) consistent with both historic district and building codes, as applicable, or who make verified interior improvements to upgrade interior systems to current, adopted building codes, including and limited to fire, HVAC, electrical, and plumbing codes, or a combination of interior or exterior improvements, may receive an exemption of up to 40% of the City's ad valorem taxes for a period not to exceed 10 years provided the repairs:

- (1) are consistent with applicable codes;
 - (2) are completed within a 18-month period beginning with receipt of a Letter of Eligibility; and
 - (3) have a combined cost in excess of \$15,000 but no greater than 50% of the assessed value of the structure on the date of receipt of a Letter of Eligibility. If an owner submits plans for additional improvements under Level 2 or Level 3 during any period of exemption previously granted under Level 3, such owner, upon approval of the Historic Preservation Commission, shall receive an exemption of the ad valorem taxes for a period of 15 years from the date of such approval at a rate prescribed by the 'level' under which the application is applied for and approved.
- (d) Aggregate Cap (per year): The City Council may impose an aggregate cap on the total amount of ad valorem taxes which may be exempted for historically significant sites in

any budget year under any or all of the levels set forth in subsections (a) – (c) of this Section. The annual cap shall be exhausted on a “first come, first served” basis, as determined by the actual date the City receives a completed application. The cap shall be a tool to limit any budgetary concerns based on yearly fluctuations in tax revenues and as such, the annual cap may be raised or lowered each year by the City Council. For calendar year 2007 and continuing annually thereafter until otherwise adjusted by the City Council, the aggregate cap on exempted ad valorem taxes on historically significant sites shall be \$10,000 per year.

- (e) Program Suspension: The City Council may suspend the Program at any time. During the suspension, no new exemptions shall be granted.
- (f) Implementation; transfer: The City shall set up an application process providing for the review of applications, verification of improvements and certification of the exemptions. The exemption may continue and be transferable upon sale of the property so long as an annual written certification by the new owner is timely received by the City within 60 days of title transfer. Periodic checks and code inspections shall be performed to verify annual owner certifications for previously-constructed exterior improvements and new construction, as well as maintenance of improvements.
- (g) Neighborhood Empowerment Zone (NEZ) Overlay under Local Government Code Chapter 378: The HNIZ is geographically coexistent with the NEZ created under Article 3.19. Owners in the NEZ who qualify for tax exemption under any level set forth in subsections (a) – (c) will receive residential building permit fee waivers on any construction (including residential inspection fees). Also, any preservation, restoration, rehabilitation, or reconstruction in the NEZ for which impact fees would otherwise be applicable will receive residential impact fee waivers.

Sec. 3.18.003 Eligibility

To be eligible for a property tax exemption, a property must meet the following requirements:

- (a) The property must meet the requirements for designation as a Level 1, 2, or 3 historically significant sites in need of tax relief as defined in Section 3.18.002.
- (b) The property must meet all requirements for application, certification and verification as set forth herein.
- (c) The rehabilitation or restoration project must fall into one of the following categories:
 - (1) **Preservation** – The act or process of applying measures to sustain the existing form, integrity, and material of a building or structure. It may include initial stabilization work, which reestablishes stability while maintaining essential form, as well as ongoing maintenance of the historic building materials.
 - (2) **Restoration** – The act or process of accurately recovering the form and details of a property and its setting as it appeared at a particular period of time by means of the removal of later work or by the replacement of earlier work.

- (3) Rehabilitation – The act or process of returning a property to a state of utility through repair or alteration which makes possible an efficient contemporary use while preserving those portions or features of the property which are significant to its historical, architectural, and cultural values.
 - (4) Reconstruction – The act or process of re-creating a portion of a building, in all new materials based on factual evidence such as photographs.
- (d) Preservation, restoration, rehabilitation, or reconstruction project requests shall require a Certificate of Appropriateness (COA) issued by the Historic Preservation Commission prior to commencing any work. The itemized costs of the work shall be provided by the applicant in order to obtain the Letter of Eligibility and COA.
- (e) Qualifying costs must equal or exceed the taxable value proportions or percentage of the home as referenced in Section 3.18.002 herein, and based on the structures pre-exemption appraisals by the Hood County Appraisal District at the time of application for a Letter of Eligibility.
 - (1) The Historic Preservation Commission shall have the ability to determine reasonable costs for qualifying expenses and shall make a report to the City Council regarding the Letter of Eligibility request.
 - (2) Qualified costs are those costs that are directly related to correcting and preventing structural defects and/or extending the life of the structure. Qualified costs include the following:
 - (A) Structural work – Only projects that retain or restore the historic integrity of the home through the use of proper design qualify for the incentive. Structural work that removes defining characteristics original to a home such as porches, columns, or dormers will not qualify for the incentive.
 - (B) Foundation repair.
 - (C) Restoration, repair, or replacement of siding and/or trim, windows and/or doors (painting included) – Only projects that retain or restore the historic integrity of the home through the use of proper materials and design qualify for the incentive. For example, replacing wood siding with aluminum or vinyl siding or the replacement of historic wood windows with vinyl or metal windows will not qualify.
 - (D) Restoration of existing historic porches and porticos – However, rebuilding a porch that was original on the house but has since been removed will qualify for the incentive.
 - (E) Plumbing, electrical, fire and HVAC repairs associated with structural work or code compliance.

- (F) Labor costs for qualified work performed under Section 3.18.002(e) (2). For sweat equity to be included as labor costs the applicant must submit two written bids from reputable contractors showing estimated labor costs for the project. The low bid for the labor would determine the value of the sweat equity.
- (G) Individuals may use donated materials and services toward the qualifying costs as long as all of the materials and labor are documented.
- (H) Design costs. Invoices from a licensed, professional architect or engineer will be required to be submitted for reimbursement. This does not include drafting or design work by a non-professional.
- (I) Roof repairs associated with structural work or major rehabilitation projects – regular replacement of shingles or other routine maintenance will not qualify
- (J) Exterior painting – Large scale painting of historic homes will qualify as long as it meets the threshold amount as determined by the Historic Preservation Commission and Council. Touch up painting or unnecessary cosmetic changes will not qualify for the incentive.

(f) Examples of Non-Qualifying Costs:

- (1) Renovation – A modernization of a historic building in which alterations are made and important features and details are eliminated
- (2) Acquisition costs
- (3) Additions
- (4) Appliances
- (5) Cabinets
- (6) Carpeting
- (7) Decks (not part of original building)
- (8) Demolition costs
- (9) Enlargement costs
- (10) Fencing
- (11) Feasibility studies
- (12) Financing fees
- (13) Furniture
- (14) Landscaping
- (15) Leasing Expenses
- (16) Moving (building) costs (if part of acquisition)
- (17) Outdoor lighting remote from building
- (18) Parking lot
- (19) Paving
- (20) Planters
- (21) Porches and Porticos additions (not part of original building)
- (22) Retaining walls

- (23) Sidewalks
 - (24) Signage
 - (25) Storm sewer or water service construction costs
 - (26) Window treatments
 - (27) Other features which the Historic Commission & Council believe to be similar in nature
- (g) All rehabilitation or restoration shall be completed within eighteen (18) months after issuance of the Letter of Eligibility under this ordinance. A one time, one year extension may be granted by the Historic Preservation Commission upon review of construction progress and any extenuating circumstances causing a delay in the completion of the project.
 - (h) In order to be considered for the Program, the property must have no delinquent property taxes, or outstanding fees, fines, liens or penalties.
 - (i) In order to be considered for the Program, the property must have no pending City Code violations.
 - (j) In order to be considered for the Program, the property must be compliant with the Zoning Ordinance, Subdivision Ordinance and all other adopted codes of the City of Granbury.

Sec. 3.18.004 Application Process

Applications for a Letter of Eligibility for historic structure preservation tax exemption pursuant to this Ordinance are to be filed with the Historic Preservation Officer who shall be the designated agent for the City for the purposes of administering this Ordinance. Each application shall be signed and sworn by the owner of the property and shall include the following with sufficient documentation confirming or supporting the information submitted herein.

- (a) A Letter of Intent outlining the proposed preservation, restoration, rehabilitation, or reconstruction project and the Level of exemption under which the application is being filed;
- (b) Legal description of the property proposed for certification;
- (c) Cost estimates provided by an individual experienced in construction estimating indicating the qualified preservation, restoration, rehabilitation, or reconstruction, design and other qualified costs equal or exceeding the percentage of the home value, as referenced herein, against the appraisal as determined by the Hood County Appraisal District at the time of application for a Letter of Eligibility. The Historic Preservation Commission shall have the ability to determine and report on reasonable cost for all qualifying expenses;
- (d) A tax certificate showing all taxes due on the property has been paid;
- (e) Photographs of all existing and proposed elevations;

- (f) Any additional relevant information requested by the City or its officers; and
- (g) Description and graphic depicting areas to be preserved, restored, rehabilitated or reconstructed. The information shall delineate each area, as well as the type of existing material and its replacement material. Proposed improvements will be required to be consistent with the Design Guidelines regarding the proposed work.

Sec. 3.18.005 Certification Process

Upon receipt of the sworn application, the Historic Preservation Commission shall recommend approval, recommend approval with conditions, or recommend denial of the application to the City Council. Upon receipt of the recommendation, the City Manager shall within sixty (60) days place the matter upon the City Council agenda for determination of eligibility. In determining eligibility, the City Council shall review the request and recommendation of the Historic Preservation Commission and determine that all the requirements of this Ordinance have been met. If eligibility is determined, the Historic Preservation Officer shall write the applicant a Letter of Eligibility citing the City Council's approval of the request. If approval with conditions has been determined by the City Council, the Historic Preservation Officer shall also itemize the conditions in the Letter of Eligibility. In its motion on the Letter of Eligibility, the City Council shall authorize the City Manager to execute a tax exemption certificate upon verification of completion of the improvements as approved by the City.

Sec. 3.18.006 Construction

The Letter of Eligibility required by this Ordinance shall be a condition precedent to commencing construction and shall be in addition to and not in lieu of any building permit or any other permit that may be required by another ordinance of the City.

Sec. 3.18.007 Verification Process

- (a) Upon completion of the preservation, restoration, rehabilitation, or reconstruction, the original applicant shall submit to the Historic Preservation Officer the following:
 - (1) A statement of completion acknowledging that the structure has been preserved, restored, rehabilitated or reconstructed in accordance with the original or amended application/plan approved by the City Council, and;
 - (2) Documentation with all invoices verifying the qualified costs of preservation, restoration, rehabilitation, or reconstruction in accordance with the original or amended application/plan submitted to the City Council.
- (b) Upon submittal of the verification documentation as noted above, the Historic Preservation Officer shall document the dollar amount of qualified preservation, rehabilitation, restoration, or reconstruction costs which determine the amount of the exemption to be granted. The dollar amount shall not exceed the cost approved by the City Council, nor shall any exemption be granted to any cost not approved on the original application submitted and approved by the City Council. The Historic Preservation Officer and/or Building Official shall make an investigation of the property and approve or disapprove whether the property has been completed as required for certification,

including completion within the required eighteen (18) month period. If the repair or renovation matches the construction plan approved by the City Council, the Historic Preservation Officer shall notify the City Manager in writing of compliance. The City Manager, upon receipt of the verification documentation, but no later than sixty (60) days thereafter, shall execute a tax exemption certificate documenting the dollar amount of the exemption to be granted to the property, and forward same to the Tax Assessor/Collector for Hood County.

- (c) If the preservation, rehabilitation, restoration, or reconstruction deviates in any way from the construction plan approved by the City Council, the original applicant shall be required to complete or correct the repair or rehabilitation in order to obtain the tax exemption provided by this Ordinance. When the verification documentation receives a favorable review by the City, the City Manager shall execute a tax exemption certificate and forward same to the Tax Assessor/Collector for Hood County. Only the original applicant may make a request for the exemption under the original application submitted to the City Council.

Sec. 3.18.008 Alteration or Destruction of Property

- (a) During the tax exemption period, if the City Manager or his designee or the Historic Preservation Officer has reason to believe that a structure receiving tax exemption pursuant to this Ordinance has been altered without proper approval of a Certificate of Appropriateness, converted to a non-residential use, totally or partially destroyed by the willful act of the owner or his/her representative, or allowed to migrate into a state of disrepair or negligence by the owner or his/her representative, the City Manager or his designee, or the HPO shall immediately cause the matter to be scheduled for consideration by the City Council. If, after giving notice and hearing to the owner, the City Council determines that the structure receiving tax exemption pursuant to this Ordinance has been altered without proper approval of a Certificate of Appropriateness, converted to a non-residential use, or totally or partially destroyed by the willful act or through negligence of the owner or his/her representative, then Letter of Eligibility shall terminate and the exemption of taxes pursuant to this Ordinance shall likewise terminate. This provision shall not apply to destruction or alterations that result from acts of God.
- (b) If the tax exemption certificate executed by the City Manager is timely recorded by the owner of the property in the Deed Records of Hood County with the approved application, the tax exemption authorized above shall constitute a covenant running with the land for the period provided in this Ordinance. Should the owner of the property ever cease to comply with the terms of the application and of this Ordinance during such exemption term, this exemption may be revoked for the years remaining in such term, upon a finding of noncompliance by the City Council, after giving notice and hearing to the owner. The City Manager or his designee shall advise the Chief Appraiser of the Hood County Appraisal District of the revocation of the exemption and shall file an appropriate document in the Deed Records of Hood County revoking the tax exemption.
- (c) In the event that any affected jurisdiction having granted tax exemption determines that

the applicant or owner is in default of any of the terms or conditions contained in the Letter of Eligibility, and then the affected jurisdiction shall give the applicant or owner sixty (60) days written notice to cure such default. In the event such default is not cured to the satisfaction of the affected jurisdiction within the sixty (60) day notice period, then the Letter of Eligibility shall terminate and all exemption of taxes shall likewise terminate.

ARTICLE 3.19 NEIGHBORHOOD EMPOWERMENT ZONE

Sec. 3.19.001 Neighborhood Empowerment Zone

A Neighborhood Empowerment Zone ("NEZ") as set forth in Local Government Code Chapter 378, as amended, is hereby created to promote economic development and the rehabilitation of affordable housing in the NEZ. The NEZ shall be geographically coexistent with the HNIZ established under Article 3.18. Owners in the NEZ who qualify for tax exemption under any level set forth in subsections 3.18.002 (a) – (c) will receive residential building permit fee waivers on any construction (including residential inspection fees). Also, any preservation, restoration, rehabilitation, or reconstruction in the NEZ for which impact fees would otherwise be applicable will receive residential impact fee waivers.

Section 3.

Ordinance 01-819, as amended, the Zoning Ordinance of the City of Granbury, is hereby amended by revising paragraph 6 of Section 14.2.A, "Historic Preservation Commission", to read as follows:

6. The Commission shall be empowered to:
 - a. Make recommendations for employment of staff and professional consultants as necessary to carry out the duties of the Commission.
 - b. Prepare rules and procedures as necessary to carry out the business of the Commission, which shall be ratified by the City Council.
 - c. Adopt criteria for the designation of historic, architectural, and cultural landmarks and the delineation of historic districts, which shall be ratified by the City Council.
 - d. Conduct surveys and maintain an inventory of significant historic, architectural, and cultural landmarks and all properties located in historic districts within the city.
 - e. Recommend the designation of resources as landmarks and historic districts.
 - f. Create committees from among its membership and delegate to these committees' responsibilities to carry out the purposes of this ordinance.
 - g. Maintain written minutes which record all actions taken by the Commission and the reasons for taking such actions.
 - h. Recommend conferral of recognition upon the owners of landmarks or properties within districts by means of certificates, plaques, or markers.

- i. Increase public awareness of the value of historic, cultural, and architectural preservation by developing and participating in public education programs.
- j. Make recommendations to the city government concerning the utilization of state, federal, or private funds to promote the preservation of landmarks and historic districts within the city.
- k. Approve or disapprove of applications for Certificates of Appropriateness pursuant to this ordinance.
- l. Prepare and submit annually to the Council a report summarizing the work completed during the previous year.
- m. Prepare specific design guidelines for the review of landmarks and districts.
- n. Recommend the acquisition of a landmark structure by the city government where its preservation is essential to the purpose of historic preservation and where private preservation is not feasible.
- o. Propose tax abatement program(s) for landmarks or districts.
- p. Accept on behalf of the city government the donation of preservation easements and development rights as well as any other gift of value for the purpose of historic preservation, subject to the approval of the City Council.
- q. Make a recommendation to help determine the eligibility and length of ad valorem tax exemptions for applications, including landmarks submitted under the Historic Neighborhood Improvement Zone Program.

SECTION 4.

This ordinance shall be cumulative of all provisions of ordinances and of the code of the City of Granbury, Texas, as amended, except where the provisions of this ordinance are in direct conflict with the provisions of such ordinances and such Code, in which event the conflicting provisions of such ordinances and such Code are hereby repealed.

SECTION 5.

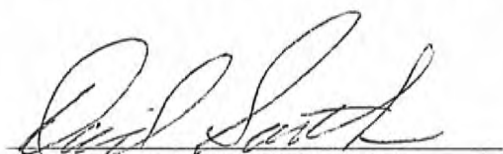
It is hereby declared to be the intention of the City Council that the phrases, clauses, sentences, paragraphs, and sections of this ordinance are severable, and if any phrase, clause, sentence paragraph or section of this ordinance shall be declared unconstitutional by the valid judgment or decree of any court of competent jurisdiction, such unconstitutionality shall not affect any of the remaining phrases, clauses, sentences, paragraphs and sections of this ordinance, since the same

would have been enacted by the City Council without the incorporation in this ordinance of any such unconstitutional phrase, clause, sentence, paragraph or section.

SECTION 6.

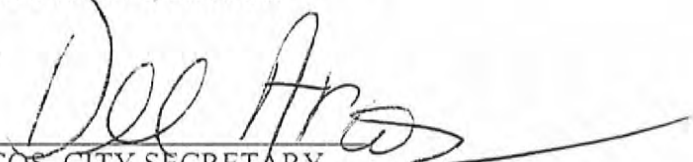
This ordinance shall be in full force and effect after its passage and it is so ordained.

DULY PASSED AND APPROVED BY THE CITY COUNCIL OF THE CITY OF GRANBURY, TEXAS ON THIS THE 5th DAY OF JULY, 2007.



DAVID SOUTHERN, MAYOR

ATTEST:



DEE ARCOS, CITY SECRETARY

EFFECTIVE: October 1, 2007

APPROVED AS TO FORM AND LEGALITY:



CITY ATTORNEY

HNIZ/NEZ

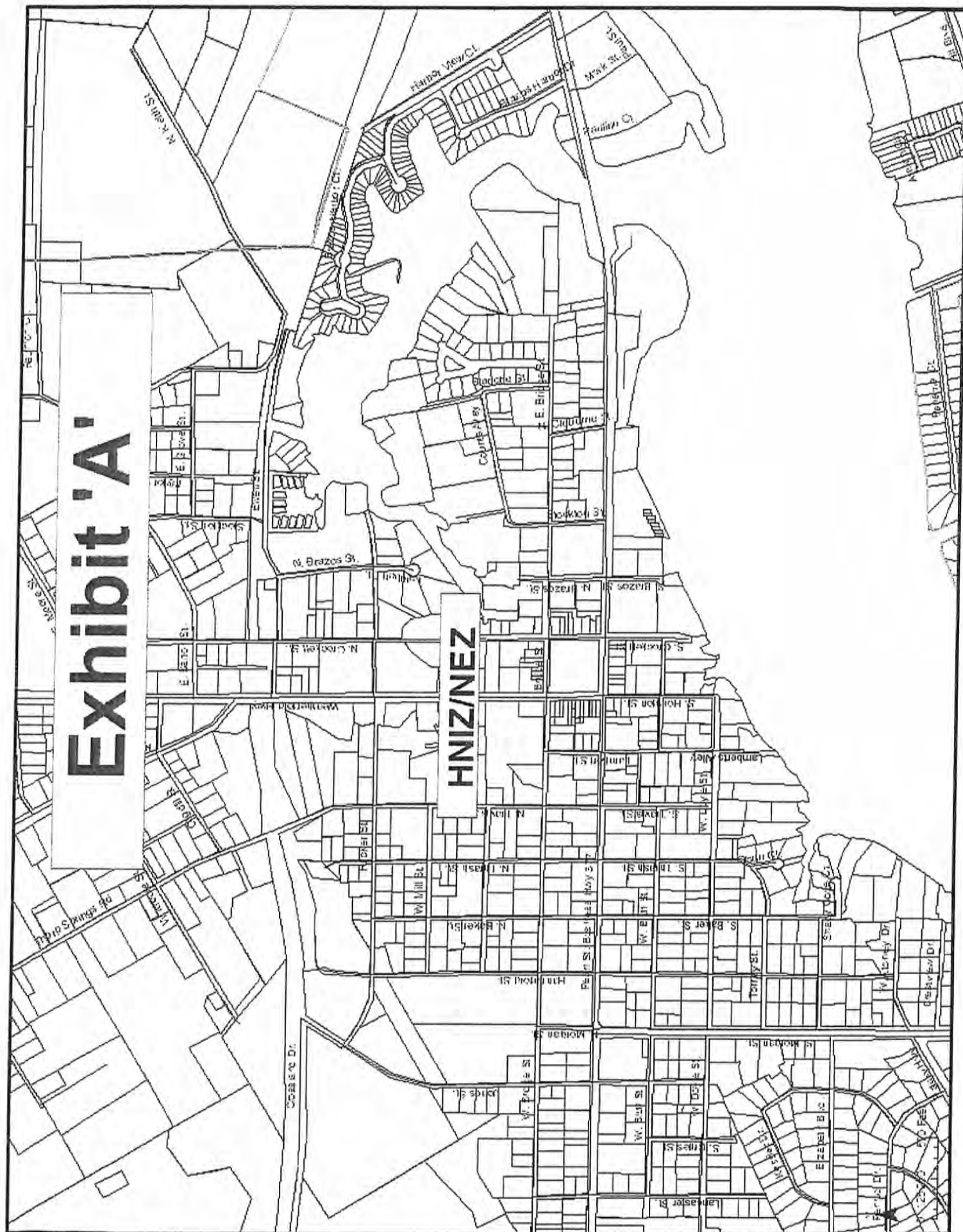
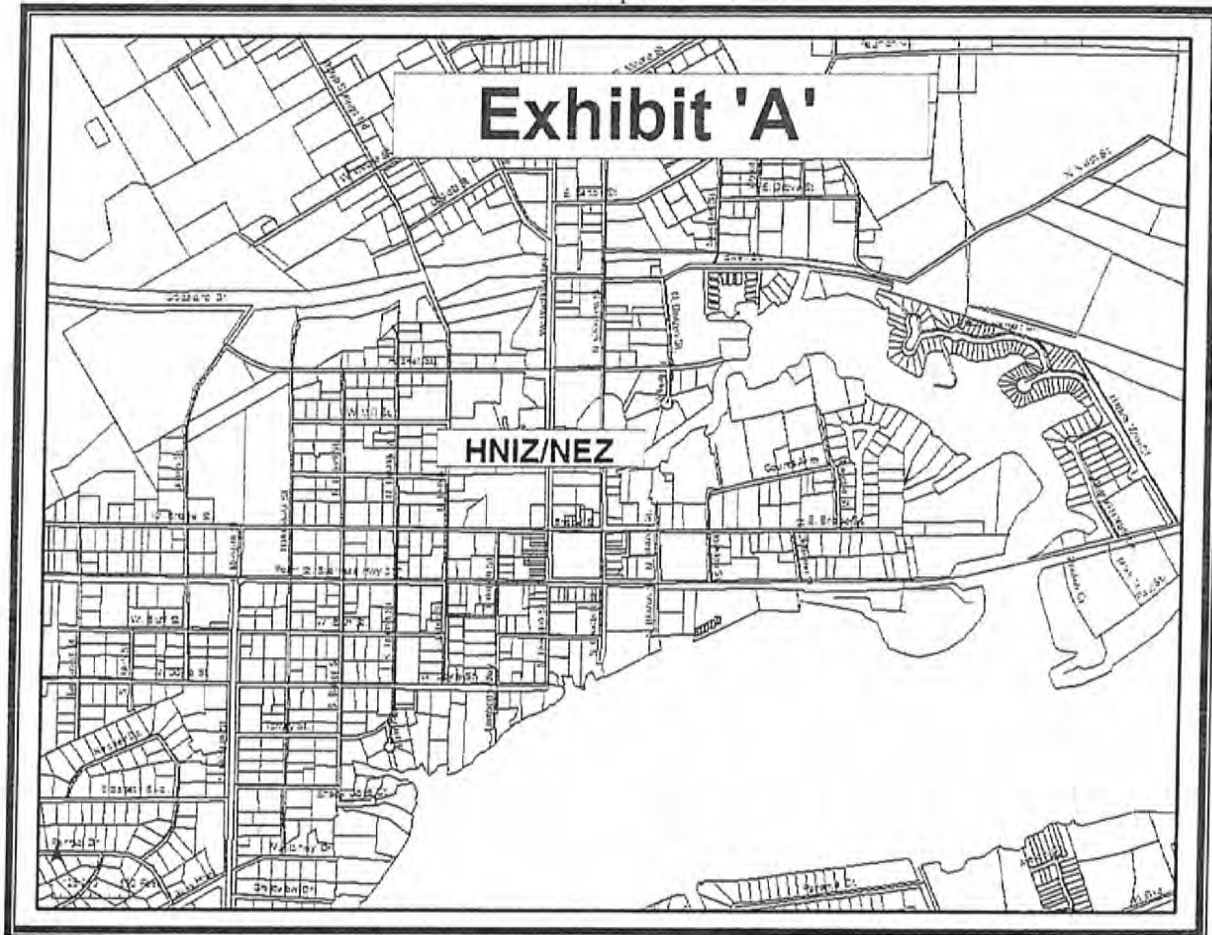


Exhibit A

April 2007, Historic Preservation Overlay &
Historic Neighborhood Investment Zone & Neighborhood Empowerment Zone (HNIZ/NEZ)
Graphic





Heritage Preservation *Incentive Programs*



Local Tax Exemptions

The heritage preservation tax exemption ordinance was originally passed by City Council in 1984 for the purpose of providing tax relief needed to encourage preservation and maintenance of the historic structures of the city. The money saved by participating in the program is meant to be used by the participant to make improvements and repairs to the structure or site. The Tax Exemption

Program offers a partial exemption based on the improvements value on the heritage property; the exemption will not affect any portion of the property taxes related to land. The percentage of tax exemption for which a property is eligible is based on the class of the historic structure and can range from 38% exemption to 100% exemption. Plano Independent School District and Collin College also participate in the city's tax exemption program. Collin County operates a separate tax abatement program for historical properties. 82 properties received local tax exemptions in 2017, totaling \$56,248 in city receipts and \$234,915 for all three participating tax entities.



State and Federal Tax Credits

State and federal tax credits are available to help fund renovation/rehabilitation projects depending on the size and scope of the project. A federal tax credit worth 20% of the eligible rehabilitation costs is available for buildings listed on the National Register of Historic Places. A state tax credit worth 25% of eligible rehabilitation costs is available for buildings listed on the National Register of Historic Places, Recorded Texas Historic Landmarks, and Texas State Antiquities Landmarks. Downtown Plano is a National Register District and most of the properties within the area considered to be contributing and would be eligible for these credits.

Fire Sprinkler Program

Fire protection of Downtown Plano is a long-standing concern. Downtown was repeatedly destroyed by fire in the 1890s. Today, only a few buildings in the historic commercial core have fire sprinklers. Plano Fire-Rescue is working with downtown merchants and building owners to reduce risk and install a shared fire sprinkler system. As an incentive, the City will pay the cost of extending water lines and installing fire valves and risers to serve building groups. The merchants pay the cost of internal service lines and sprinkler heads.



Tax Increment Financing (TIF)

In 1999, the City of Plano, the Plano Independent School District, Collin County and Collin College created a tax increment finance (TIF) district to encourage economic reinvestment along the DART rail corridor. As authorized by Chapter 311 of the Tax Code, a TIF receives funding through ad valorem taxes derived from the growth of the total appraised value of

property within the district occurring after the district is established. TIF funds can be spent for infrastructure, facilities and land within the district to facilitate economic reinvestment. State law grants municipalities broader development powers within a TIF district. The rehabilitation of the historic Courtyard Theatre and Cox Building rehabilitation was a project funded by the TIF.



380 Agreements

Chapter 380 of the Local Government Code gives municipalities authority to make grants and loans of funds or services to further economic development. This authority, combined with that associated with tax increment financing, is the basis for most public/private partnership development agreements.

Neighborhood Empowerment Zone (NEZ)



Authorized under Chapter 378 of the Local Government Code, the City of Plano created Neighborhood Empowerment Zone #1 in August 1999, which includes downtown and the surrounding neighborhoods. Among the powers granted by the law, cities may waive development fees within an empowerment zone to stimulate economic development, including the production and rehabilitation of affordable housing. Plano's empowerment zone waives all development-related fees for construction, remodeling and rehabilitation of commercial buildings and single-family housing. Fees are also waived for the rehabilitation of multifamily units, provided the cost of work is greater than \$8,000 per unit. The neighborhood park fee is waived for new multifamily construction. As of June 2015, \$791,051 in fees have been waived, resulting from construction valued at \$103,953,898.

Regulatory Incentives

A number of regulatory incentives accommodate development and reduce cost. No existing building is required to provide parking regardless of occupancy. Up to 4,500 square feet of building area may be added to a designated historic building without providing parking. New buildings are required to provide parking, but at a much lower rate than required elsewhere in the City. The Planning & Zoning Commission can decrease the amount of required parking by giving credit for nearby public parking. Buildings may cover 100 percent of the lot and be five stories in height. Live/work units are permitted on the ground floor of buildings. Building stoops, awnings, balconies and signs can extend into the street right-of-way. Where sidewalks are sufficiently wide, the City permits outside dining under a license agreement with the restaurant.



Public Improvement District (PID)

As authorized by Chapter 372 of the Local Government Code, a public improvement district (PID) may be established by petition of property owners. An assessment on properties within the boundaries of the district may be used to pay for additional security and lighting, landscaping and other public improvements, marketing and advertising, and special events. In 2014, City Council approved a PID for Downtown Plano, with a managing committee composed of property owners. The PID is anticipated to generate between \$130,000 to \$175,000 annually during its initial three-year term. The City contributes \$50,000 annually to the PID.

DIVISION C. Tax Abatement

Sec. 10-793. Tax Abatement

In accordance with state law, the City Council finds that all designated landmarks structures are historically significant and entitled to tax relief in order to encourage historic preservation. Fifty percent (50%) of the assessed value of any building, structure or site listed on the Tyler historic landmark register and the land necessary for access to and from the building, structure, or site, up to a maximum assessed value amount of \$ 2,000,000, must be exempt from annual City ad valorem taxation, provided that such building, structure or site is listed on the register on the first day of January of the applicable tax year. As long as the property remains on the Tyler historic landmark register, has not changed ownership, and otherwise remains in compliance with all applicable ordinances, the owner shall not be required to re-apply for exemption on an annual basis. (Ord. 0-98-81, 10/7/98); (Ord. 0-2005-61; 8/17/05) (Ord. No. 0-2012-83; 10/10/12)

Sec. 10-794. Tax Abatements for Historic Landmarks

- a. The tax abatement provided for in this section is intended to encourage historic preservation within the City of Tyler. Any building or structure that has been designated as a historic landmark pursuant to the terms of this Article, and which is substantially rehabilitated as provided herein, may have abated one hundred percent (100%) of the amount of any increase in the assessed value for purposes of ad valorem taxes levied by the City of Tyler in excess of the assessed value of the property for a period of five (5) years following issuance of a Certificate of Appropriateness. Said tax abatement must only apply to the increase in the assessed value of the property over the assessed base value of the property, regardless of the actual value of any permits and improvements. In order to be eligible for tax abatement, said renovations must be at a minimum cost of thirty thousand dollars (\$30,000.00) and must be completed within a period of two (2) years from the date of issuance of a Certificate of Appropriateness. The tax abatements would become applicable to the property in January of the first tax year following the date of issuance of a Certificate of Appropriateness. The tax abatements must continue in effect during the established five-year period as long as the property remains on the Tyler historic landmark register. The total amount of said improvements subject to tax abatement per year for the five-year period on a single piece of property must not exceed two million dollars (\$2,000,000).
- b. To be eligible for property tax abatement under this section, a property must meet the following requirements:

ARTICLE XI. HISTORIC PRESERVATION
DIVISION C. **Tax Abatement**

1. The building or structure must meet the requirements for, and have previously been designated as, a historic landmark pursuant to section 10-782.
 2. The structure or building upon which the renovation is to occur must be at least fifty (50) years old or older;
 3. The tax abatement under this section is available for buildings or structures on both residential and commercial property.
 4. Any renovations or improvements must conform to the Secretary of the Interior's Standards for Rehabilitation and Guidelines for Rehabilitating Historic Buildings, a copy of which is available in the Planning Department.
- c. Application process. Applications for tax abatement under this section are voluntary. Any owner seeking tax abatement under this section must file an application for a Certificate of Appropriateness in conformance with section 10-786. Said application must include a projection of the estimated construction time and predicted completion date of the historic repair or rehabilitation. The requirements of sections 10-786 and 10-783 must govern the application, granting and removal, and maintenance process for the Certificate of Appropriateness. However, the actual granting of the tax abatement under this section shall be subject to the discretion and approval of the City Council. After a public hearing, the City Council may by ordinance approve the abatement provided for in this section. If approved by City Council, the applicant for abatement shall cause a copy of the ordinance and application for exemption to the Smith County Appraisal District not later than January 1st of each subject tax year.
- d. Time for completion; re-capture. If the improvements, renovation or restoration repair work on a particular piece of property are not completed within two (2) years from the date of issuance of the Certificate of Appropriateness, any and all tax abatements previously received on said property during the two-year period must be revoked, and the City may re-capture all tax abatements that the property owner received during said two-year period. In addition to the re-capture, the property owner shall not be eligible for the tax abatement for the remaining three (3) years.
- e. Eligible costs. Eligible costs must include construction, reconstruction, alteration, change, restoration, removal or demolition of any exterior architectural feature of a building or structure on the Tyler historic landmark register. Materials and labor for repairing, replacing or adding any of the following shall be eligible, if expressly approved as part of the Certificate of Appropriateness:

ARTICLE XI. HISTORIC PRESERVATION
DIVISION C. Tax Abatement

1. Structural walls;
 2. Exterior doors;
 3. Windows;
 4. Exterior brick veneers or treatments;
 5. Roof and gutter where necessary for structural integrity;
 6. Facade items;
 7. Limited demolition, not more than fifteen percent (15%) of the original structure, and cleanup related to the eligible costs in this subsection;
 8. Exterior paint (consistent with those colors available during the time period that the structure was built);
 9. Foundations;
 10. Structural subfloors;
 11. Structural ceilings;
 12. Termite damage and treatment;
 13. Fixtures and decorative items attached to the main structure, or that contribute to the historic integrity of the property;
 14. Fencing that contributes to the historic integrity of the property.
- f. Ineligible costs. Ineligible costs shall include the following:
1. Overhead;
 2. Taxes;
 3. Supervisor payroll;
 4. Repairs of construction equipment;
 5. Tools;
 6. Plumbing and electrical wiring;
 7. Mechanical equipment; air conditioning systems;
 8. Any other items not directly related to the exterior appearance or the structural integrity or viability of the structure, except that interior items for commercial properties shall be allowed.
- g. Use in conjunction with other incentives. The tax abatement authorized by this

ARTICLE XI. HISTORIC PRESERVATION
DIVISION C. Tax Abatement

section may be used in conjunction with other types of abatements or incentives, either existing and that may be developed in the future, unless otherwise prohibited by statute or ordinance.

- h. Sunset review. Before the fifth anniversary of the date of re-adoption of this section, the City Manager shall review the tax abatement program established herein. The City Manager shall review the effects of, and any benefits or problems associated with, this program. Following such review, the City Manager shall make a recommendation to the City Council regarding whether to continue, modify, or repeal this section. (Ord. No. 0-2005-61; 8/17/05) (Ord. No. 0-2008-8; 1/9/08) (Ord. No. 0-2012-83; 10/10/12)

Sec. 10-795 – 799. Reserved



DOWNTOWN INCENTIVE PROGRAMS

To encourage revitalization, the City of Waxahachie offers incentives for development in Downtown. The incentives are part of an overall strategy to leverage investment, lower the cost of doing business and level the playing field for businesses and property owners choosing to invest in their properties.

*Downtown Waxahachie has been designated as a Historic Overlay District.
All projects within the District must be reviewed by the Heritage Preservation Commission.*

Historic Tax Exemptions

The City of Waxahachie provides a tax exemption for historic properties approved by the Heritage Preservation Commission. This exemption amounts to 25% of the city portion of assessed property taxes up to \$25,000. The exemption must be applied for annually. As the Central Business District (CBD) is listed on the National Register, most properties in the downtown area are eligible to receive this exemption.

The City of Waxahachie provides a reinvestment tax incentive for historic property owners that can help with the cost of renovation or rehabilitation of a historic building. If a property owner completes work that has been pre-approved by the Heritage Preservation Commission in any calendar year that

amounts to at least \$1,250, that property owner is eligible to receive a 50% reduction in the city's portion of their property taxes. This incentive is applied after all other exemptions are taken. There is no limit to the number of years a property owner can apply for the exemption, so projects can be phased in so the exemption may be received for several years. For commercial property owners, this exemption can cover the following renovations and rehabilitations:

- Mechanical
- Plumbing
- Electrical
- Structural
- Interior/exterior repairs and improvements.

Depending on the size and scope of the project, federal tax credits are also available to help fund renovation/rehabilitation projects. A federal tax credit worth 20% of the eligible rehabilitation costs is available for buildings listed in the National Register of Historic Places. Downtown Waxahachie is a National Register District and most of the properties within that area are considered to be "contributors" and would be eligible for this credit.

The tax credit is available only for income-producing properties. For example, office, retail, hotel and apartments are eligible. If Federal tax credits are sought, the project plans must be pre-approved by the State Historic Preservation Officer (SHPO). Members of the Heritage Preservation Commission have worked on projects of this type and would be happy to consult with you on your future project.

Fire Monitoring Program

The city council has authorized funds from the Tax Increment Reinvestment Zone (TIRZ) to install fire monitoring systems downtown. Under this program, the City of Waxahachie pays for:

- Fire Alarm Control Panel
- Phone lines
- Monthly monitoring fee

Building owners are responsible for:

- System and monitors in their building
- Wiring running from their building to the Fire Alarm Control Panel

Building owners may use any licensed alarm company they choose. The city has contracted with BAT Security for the

ongoing monitoring service. For more information about this program please contact:

Dennis Crecelius
Waxahachie Fire Marshal
469-309-4203



For more information contact Anita Brown with the City of Waxahachie at 469-309-4111

Development Incentives

The city has adopted many regulatory incentives and ordinances to encourage downtown development.

- No off street parking is required regardless of occupancy for any existing building.
- Residences are encouraged in upper stories and allowed on ground floors.
- No impact fees are assessed on up to 8,000 sq. ft. for commercial or multi-family developments.
- There is a 3-story height limit in the Central Business District.
- Up to 95% of lot may be covered.
- Where sidewalks are sufficiently wide, the city permits outside dining under a license agreement with the restaurant.

Any other impediment to a development project can be reviewed on a case-by-case basis and waivers may be granted. For more information on these incentives, contact:

Shon Brooks
Director of Planning
469-309-4291

Facade Grant Program

Historic Waxahachie, Inc. has recently adopted a façade grant program that offers a grant of up to \$5,000.00 to property owners in the Historic Overlay District for façade improvements. The Heritage Preservation Commission must approve all design plans before work begins to be

eligible for this grant. However, there are no matching funds required. For more information on this grant program contact Historic Waxahachie, Inc. or

Anita Brown
Director of Downtown Development
469-309-4111

TIRZ Financing Program

Downtown Waxahachie is part of the Tax Increment Reinvestment Zone #1. This is a special district to reinvest added tax revenue from new development back into the area where originated. The goal is to stimulate new private investment and increase real estate values. Many expenses related to redevelopment can be eligible to receive funding from the TIRZ.

Past TIRZ projects include:

- Restoration of the MKT Depot
- Conversion of the former lumber yard to the new Farmers Market
- Renovations of sidewalks to conform to ADA standards
- Brick pavers and antique street lighting

Chapter 380 Agreements

The City of Waxahachie has approved the use of Chapter 380 agreements to promote economic development such as commercial and retail projects. Chapter 380 of the Local Government Code gives municipalities the authority to make grants and loans of funds or services to further economic development. This authority, combined with associated tax increment financing, provides a wide array of tools.

Some examples of the proper use of Chapter 380 incentives include:

- Grants of property
- Improvements
- Cash reimbursements
- Fee and permit waivers
- Rent subsidies
- Use of municipal personnel, facilities and supplies
- Infrastructure



Low Interest Loan Programs

- Program details from:
 - San Antonio

City of San Antonio Neighborhood and Housing Services Department
1400 S. Flores San Antonio, TX 78204 210.207.6459

Owner-Occupied Rehabilitation and Reconstruction Program

Provides assistance to income eligible homeowners to bring their housing into compliance with local codes and provide safe housing.

- Roof
- Foundation
- Electrical & Plumbing
- Windows & Doors
- Energy Efficiency
- Building Envelopes
- Accessibility Improvements
- Lead Hazard Reductions

**Applicant /
Property Eligibility
Requirements**

- U.S. Citizen or legal resident
- Prior program participants are not eligible
- Verification of income, assets will be required to determine program eligibility such as checking and saving accounts
- Home must be within the city limits
- Single family household unit
- Must have clear title: no liens or judgments
- Taxes must be current
- Must have current property insurance
- Meet HUD Income Guidelines must be 80% of the Area Median Income or below

Household Size	1	2	3	4	5	6	7	8
Maximum Income*	\$35,600	\$40,650	\$45,750	\$50,800	\$54,900	\$58,950	\$63,000	\$67,100

*2017 Income Limits

**Terms of
Assistance**

- Max Amounts: \$75,000 for rehab & \$95,000 for recon
- 10 to 20 year deferred forgivable loan
- % of loan forgiven each year
- No payments during deferment
- Terms remain in place as long as home remains the principle residence of homeowner
- Funds become due to the City if: the house is sold, title transferred, or property is no longer the primary residence of the applicant

Application Process

- Applications issued and accepted October 1, 2017 – January 31, 2018.
- Selection process for assistance conducted through a lottery per City Council District
- Participants selected through the lottery will have to submit additional documentation to further determine eligibility for the program



Occupied Rehabilitation and Reconstruction Program

CITY OF SAN ANTONIO
Neighborhood and Housing Services Department
1400 S. Flores, San Antonio TX 78204
210-207-6459 or 207-5403

PROGRAM ELIGIBILITY REQUIREMENTS

Applicant/Property must:

- ☐ Property located in City of San Antonio
- ☐ Property taxes must be current
- ☐ Provide valid picture identification and/or driver's license
- ☐ Prior program participants are not eligible
- ☐ Must have clear title: no liens or judgments (title search conducted)
- ☐ Be a US citizen or Legal Resident
- ☐ Must meet HUD 2017 Income Limits established income guidelines which cannot exceed 80% of the Area Median Income (AMI) as follows:

2017 HUD Income Limits

Family Size	1	2	3	4	5	6	7	8
Annual Income	35,600	40,650	45,750	50,800	54,900	58,950	63,000	67,100

PROPERTY GUIDELINES

- ☐ Property must be owner occupied (No Rental Units)
- ☐ Single family household unit and within the San Antonio city limits
- ☐ Home must be designated a Homestead with the Bexar Co. Appraisal District
- ☐ Eligible Repairs: Roof, Foundation, Electrical & Plumbing, Windows & Doors, Energy Efficiency, Building Envelopes, Accessibility Improvements, and Lead Hazard Reductions

APPLICATION CHECKLIST

Complete applications **MUST** contain the following information:

- ☐ Complete & sign "Owner Occupied Rehab" application
- ☐ Copy of Warranty Deed
- ☐ Copy of Property Insurance
- ☐ Current Picture ID or Driver's License
- ☐ 3 months of pay stubs (current) for all occupants in household
- ☐ Self-employed: provide copy of Income Tax Return for past two years
- ☐ Award Letter from Social Security, Retirement Benefits, Child Support or any other public assistance, provide documentation from the supportive agency stating the current amount being received or awarded
- ☐ 6 months of bank statements (current)
- ☐ 2 months of utility bills (CPS & SAWS)

Attention: The homeowner must meet the eligibility requirements regarding the following: property ownership, income, property taxes, property insurance, and the assistance is provided in the form of a deferred forgivable loan, meaning the homeowner makes no payments during the deferment period. The selection process for assistance is conducted through a lottery system by City Council District. Participants selected through the lottery are not immediately eligible and all support documentation will be reviewed to further determine eligibility for the program.



City of San Antonio
Neighborhood and Housing Services Department
Owner Occupied Rehabilitation and Reconstruction Program

Application Acceptance Period: October 1, 2017-January 31, 2018.

No applications will be accepted after January 31, 2018.

For questions call (210) 207- 6459 or 207-5403

Application Form

Applicant Information	
APPLICANT NAME	CO-APPLICANT NAME
DATE OF BIRTH	DATE OF BIRTH
SOCIAL SECURITY	SOCIAL SECURITY
ADDRESS (complete address & zip)	
PHONE #	ALTERNATE PHONE #

Total Gross Monthly Income				Mortgage House Payments
Income Source	Applicant	Co-Applicant	Total Household Income	NOTEHOLDER: NAME, ADDRESS, AND ZIP CODE
Employment	\$	\$		Date of Purchase Balance of Mortgage \$ Total Monthly Payment \$
Social Security	\$	\$		
Retirement	\$	\$		
Rental Income	\$	\$		
OTHER**	\$	\$		
TOTAL	\$	\$	\$	

If you have been employed in your current position for less than two years, please provide the name and address of your previous employer(s).

Return application to: Housing Programs Unit 1400 S. Flores San Antonio, TX 78204

Describe "Other" income and provide the recipient's name, the source of the money, and the monthly amount received.

NOTICE: "OTHER" INCOME: includes alimony, child support, or separate maintenance.

LIST CREDIT/CHARGE ACCOUNTS AND MONTHLY EXPENSES.

CREDITORS	PAYMENT	BALANCE	PAYMENTS CURRENT?
-----------	---------	---------	-------------------

Property Taxes	\$ _____	Child Support	\$ _____	Prescriptions	\$ _____
Home Insurance	\$ _____	Child Care	\$ _____	Auto Insurance	\$ _____
Utilities	\$ _____	Tuition/Books	\$ _____	Gas/Bus Fare	\$ _____
Groceries	\$ _____	Medical Bills	\$ _____	Health Insurance	\$ _____

Real Estate – other than on the property to be improved (provide property address, mortgagee's name, balance owed and monthly payments). If you receive rental income from this property, please indicate the amount received on a monthly basis.

Checking Account - Bank Name: _____ Balance \$ _____ Annual Interest \$ _____

Savings Account - Bank Name: _____ Balance \$ _____ Annual Interest \$ _____

Any members in the household handicapped or disabled? YES ☐ NO ☐

Name of disabled person: _____

Is applicant or co-applicant a veteran? YES ☐ NO ☐

VOLUNTARY INFORMATION FOR GOVERNMENT MONITORING PURPOSES: The information concerning Minority Group Category is requested for statistical purposes so the Agency may determine the degree to which its programs are being utilized by Minority Families and has no bearing on the acceptance of this application. IF SUCH INFORMATION IS NOT PROVIDED, THE AGENCY IS REQUIRED TO NOTE RACE/NATIONAL ORIGIN AND SEX ON THE BASIS OF SIGHT AND/OR SURNAME.

RACE:

WHITE ☐ AFRICAN AMERICAN ☐ HISPANIC ☐ AMERICAN INDIAN ☐ ASIAN ☐ OTHER _____

SEX: MALE ☐ FEMALE ☐

ARE YOU A U.S. CITIZEN? YES ☐ NO ☐
 ARE YOU A PERMANENT RESIDENT ALIEN? YES ☐ NO ☐

APPLICANT'S CERTIFICATIONS

The applicant (whether one or more) certifies that all information in the application and all information furnished in support of this application, is given for the purpose of obtaining funds under the CDBG or HOME Program and is true and complete to the best of the applicant's knowledge and belief. The applicant additionally certifies that the applicant is the OWNER AND OCCUPANT of the property to be repaired."

 APPLICANT'S SIGNATURE

 DATE

 APPLICANT'S SIGNATURE

 DATE

PENALTY FOR FALSE OR FRAUDULENT STATEMENT. USC Title 18, Sec. 1001, provides; "Whomever, in any matter within the jurisdiction of any department or agency of the United States knowingly and willfully falsifies, conceals or covers up by any trick, scheme, or device a material fact, or makes any false, fictitious or fraudulent statement or representations, or makes or uses any false writing or document knowing the same to contain any false, fictitious or fraudulent statement or entry, shall be fined."

List all other residents and their income below:

Occupant #1	Answers
Name of Resident	
Age	
Relationship to Applicant	
How long has this person lived with you?	
If less than 12 months, when do you anticipate this person will move?	
Social Security Number	
Employer's Name	
Employer's Address	
Occupant or type of Public Assistance (SS, AFDC, TANF, CSA, Etc)	
Occupant #2	Answers
Name of Resident	
Age	
Relationship to Applicant	
How long has this person lived with you?	
If less than 12 months, when do you anticipate this person will move?	
Social Security Number	
Employer's Name	
Employer's Address	
Occupant or type of Public Assistance (SS, AFDC, TANF, CSA, Etc)	

Return application to: Housing Programs Unit 1400 S. Flores San Antonio, TX 78204

List additional residents and their income below:

Occupant #3	Answers
Name of Resident	
Age	
Relationship to Applicant	
How long has this person lived with you?	
If less than 12 months, when do you anticipate this person will move?	
Social Security Number	
Employer's Name	
Employer's Address	
Occupant or type of Public Assistance (SS, AFDC, TANF, CSA, Etc)	
Occupant #4	Answers
Name of Resident	
Age	
Relationship to Applicant	
How long has this person lived with you?	
If less than 12 months, when do you anticipate this person will move?	
Social Security Number	
Employer's Name	
Employer's Address	
Occupant or type of Public Assistance (SS, AFDC, TANF, CSA, Etc)	
Occupant #5	Answers
Name of Resident	
Age	
Relationship to Applicant	
How long has this person lived with you?	
If less than 12 months, when do you anticipate this person will move?	
Social Security Number	
Employer's Name	
Employer's Address	
Occupant or type of Public Assistance (SS, AFDC, TANF, CSA, Etc)	
Occupant #6	Answers
Name of Resident	
Age	
Relationship to Applicant	
How long has this person lived with you?	
If less than 12 months, when do you anticipate this person will move?	
Social Security Number	
Employer's Name	
Employer's Address	
Occupant or type of Public Assistance (SS, AFDC, TANF, CSA, Etc)	

Grant Programs

- Program details from:
 - Farmers Branch
 - Fort Worth
 - Grapevine
 - Keller
 - Killeen
 - Victoria

Farmers Branch Commercial Façade Revitalization Program

The City of Farmers Branch Commercial Façade Revitalization Program was developed to encourage property owners to enhance the publicly viewed areas of their buildings, including exterior walls, landscaping, walkways, equipment screening, uniform signage and window replacements or upgrades.

While the program is focused on the redevelopment of the Shops at Branch Crossing/Four Corners, other commercially viable areas of the City are eligible.

PROGRAM DETAILS (please read carefully):

The City of Farmers Branch Façade Reimbursement Grant Program is set up as a single payment reimbursement to property owners per building/business, and in some situations, tenants. **Facade grants are available up to a 50/50 matching basis with a minimum project value of \$2,000 and a maximum reimbursement of \$50,000 per grant**, unless otherwise approved by the City Council. Facade grant funds focus on exterior work on storefronts, visible to the traveling public, located in the Branch Crossing Area (see attached map), or other area as approved by City Council.

All grants are available throughout the year, on a first come, first serve basis until total funds are depleted. **No grants will be awarded for work that has already been done or for work that is covered by insurance.** All submitted work will be reviewed and recommended for approval by the City of Farmers Branch Staff. Before any eligible work may begin, the City Council will provide final approval. If awarded funds, any deviation from the approved project may result in the total or partial withdrawal of the funds. Also, a City of Farmers Branch Commercial Façade Revitalization Program sign shall be displayed on the property for a minimum of three (3) months to help publicly recognize the grant program.

Application Process

- 1) Determine eligibility:** Discuss project plans with Economic Development Director and determine if the plans fit the zoning and building codes for the area. This information can be gathered from the Community Services department.
- 2) Fill out façade reimbursement grant application form and sign the agreement form.** All grant applications must include a scale drawing by the project architect or contractor of all the proposed grant work to be done. **Color samples of all final paint selections must be included with the application to be reviewed by the City of Farmers Branch staff.** Obtain itemized written work estimates on all project work from contractors or project architects. Self-contracted work will be reimbursed for actual legitimate expenses, excluding labor.
- 3) Return the completed application form** with all original itemized work estimates, color samples, and drawings of the proposed work to the Economic Development office at 13000

William Dodson Parkway, no later than 5 p.m. the Thursday prior to the first Friday of each month.

- 4) ***The approval process will include without limitation the following:*** All projects must meet current building standards and codes, as well as building permit requirements.
- a) The City of Farmers Branch shall consider only Applications which have been properly and fully completed and which contain all information required in the Application or requested by any staff or council.
 - b) All construction bids submitted by an Applicant must be current and must be dated no earlier than ninety (90) days prior to the Application request. Bids shall be submitted on the contractor's or project architect's letterhead and shall contain the contractor's name, address, telephone number and shall itemize the bid in a manner that allows the City of Farmers Branch Staff to determine the bid components and authenticity of the bid.
 - c) For work done by the applicant, the applicant must provide a signed affidavit stating the qualifying improvements, the cost of each, and the total amount of the qualified improvements.
 - d) Applicant must provide a valid Texas Driver's License or Texas I.D. card for identity verification purposes.
 - e) The Applicant must provide a completed W-9 Form, including a Social Security number, pursuant to IRS regulations. The City is required to file tax documentation on disbursements over \$600.
 - f) Applicants receiving approval by the City Council shall commence construction described within the Application within ninety (90) days from the date of approval. All Applicants must complete the construction described in the Application within one (1) year from the date the funds were approved. An extension of more than one (1) year may be granted during the application process if the scope of the project requires additional time as determined by the City of Farmers Branch staff. If the Applicant is unable to commence construction within ninety (90) days from the date the grant is approved or complete construction within one (1) year from the date the grant is approved, the Applicant may submit a written request for an extension for the commencement date or completion date provided the extension request is made prior to the ninety (90) day or one (1) year time limit. The City of Farmers Branch shall not be obligated to allow extensions but may do so for good cause determined solely by the City Council. An extension denial cannot be appealed and shall be final.
 - g) The Applicant, by submission of this Application, represents the construction described within the Application shall be used in a building which is in compliance with all codes and ordinances.
 - h) As a condition of this program Application and in consideration of the opportunity to apply for funds, the Applicant consents and shall allow the City of Farmers Branch staff inspections to determine that the funds, if awarded, shall not be used for construction to any building that is not in compliance with the City Municipal Codes and Ordinances which are applicable to the construction contemplated in the application.
 - i) An Applicant who submits an Application that was denied a grant by the City Council shall not be eligible to re-submit a grant application for six (6) months from the date the prior Application was declined by the City Council unless specifically waived by the City Council.
 - j) The City of Farmers Branch shall award funds considering the amount requested, funds available, the program intent, condition of the building in which the funds will be used, effectiveness of the construction, other fund requests, the type and nature of the construction, and the proposed construction results considering the program guidelines.

- k)* The Applicant shall be required to furnish digital photographs of the building's exterior, roof and foundation as part of the Application request and also after the construction is completed, as a condition of final grant reimbursement.
- l)* The Applicant is required to obtain all applicable City permits and City approvals required for the construction if funds are awarded.
- m)* No Applicant, nor Applicant agent, representative or tenant shall be entitled to receive approval on the same property if requested within **three (3) years** from the date previous funds were awarded by the City of Farmers Branch, unless a multi-phase project was described in the original application and approved by the City Council.
- n)* An Applicant must attend City of Farmers Branch meetings which consider the Application or when requested to do so by the City of Farmers Branch. Failure to attend a City of Farmers Branch meeting when required shall be cause for rejection of the Application.
- o)* The City Council meets on **the first and third Tuesdays of the month**, unless otherwise stated, and all applicants are required to attend and present their project to the Council for review and approval.
- p)* Improvements funded by this program will be maintained in good order for a period of one (1) to five (5) years dependent upon the grant amount (please see the Lien Schedule); graffiti and vandalism will be dutifully repaired during this time period. If the façade is altered for any reason, not maintained in good order or the property is sold during the designated time frame from construction, the applicant may be required to reimburse the City of Farmers Branch immediately for the full amount of the Façade Reimbursement Grant.

5) Program Changes and Requirements

- a)* The City Manager or the City Manager's designee is authorized to modify the name of this program as needed for marketing or public relations purposes.
 - b)* Notwithstanding anything stated in this Application to the contrary, the award of any incentive is at the sole discretion of the City Council and the program may be suspended or terminated at any time regardless of availability of funds or pending applications on file.
 - c)* No Applicant has a proprietary right to receive grant funds. The City of Farmers Branch shall consider any Application within its discretionary authority to determine what amount would be in the best interest of the program. The review criteria may include, but shall not be limited to, compatible architectural design, streetscape objectives and overall redevelopment of the Branch Crossing area.
- 6) Reimbursement:** When the entire project has been satisfactorily completed, the applicant shall present the City of Farmers Branch Economic Development office with copies of all paid invoices, including copies of cancelled checks and/or credit card receipts, for a single payment reimbursement of the approved funding. Along with the financial documents the applicant must provide digital photos of the completed work that include detailed photos of all projects funded by the program as well as wider shots of the entire building.
- 7) Appeal Process:** Any Application rejected by the City of Farmers Branch shall be entitled to review by the Farmers Branch City Council. The Applicant shall submit a written request for review to the Assistant City Manager no later than ten (10) days from the date the Application is denied by the City of Farmers Branch. The request for review by the Farmers Branch City Council shall state reasons why the Applicant believes the Application was improperly refused by the City of Farmers Branch staff or City Council and the reasons why the Applicant believes the Application should be approved. The written review request shall be furnished by the Assistant City Manager to the City of Farmers Branch staff. The Staff of the City of Farmers Branch shall, within ten (10) days of receipt of the Applicant's written request from the

Assistant City Manager, furnish to the Assistant City Manager the reasons for refusing the Application and shall state reasons why the Application should not be approved by the Farmers Branch City Council. Review by the Farmers Branch City Council will be scheduled within the time restraints and business issues of the Farmers Branch City Council, but in no event later than ninety (90) days from the date the written request for review is received by the Assistant City Manager from the Applicant. The City Council shall review the Application and consider the action taken by the City of Farmers Branch staff or council regarding the Application. The Farmers Branch City Council shall not be required to reverse the City of Farmers Branch staff unless the Farmers Branch City Council determines the City of Farmers Branch staff did not act in substantial compliance with the Application request and applicable policies relating to the Farmers Branch Commercial Revitalization Program. The Farmers Branch City Council determination shall be deemed final action regarding the Application.

If you have any application questions, please contact the Economic Development Department at 972-919-2512. If you have any building permit questions, please contact Community Services at 972-919-2549.

CHECKLIST

Use this form as a checklist to follow all steps needed to complete the Façade & Sign Reimbursement Grant Program application to receive approval.

- ☐ Meet with Farmers Branch Economic Development Department to determine eligibility and to review Façade Reimbursement Grant and instructions.
- ☐ Meet with the Community Services if any work may involve receiving a building permit.
- ☐ Completely fill out Façade Reimbursement Grant application form and sign agreement form. (Also include required attachments: application and all submitted materials; photographs of building's exterior, roof and foundation)
- ☐ Return completed application and agreement form with required attachments to the Farmers Branch Economic Development Department no later than 5 p.m. Thursday, prior to the first Friday of each month, to be added to the next Council meeting agenda.
- ☐ Attend and present Façade Reimbursement Grant application project to the City Council for their design approval.
- ☐ Receive design approval of proposed work listed on grant application.
- ☐ Façade Reimbursement Grant project construction may commence. Work must commence within 90 days of approval from the City of Farmers Branch and be completed within one year.
- ☐ Upon completion of Façade Reimbursement Grant project, furnish photographs of the building's exterior, roof and foundation; copies of all paid invoices, including copies of cancelled checks and/or credit card receipts, to receive a single payment reimbursement of the approved funding. The check may be presented during a City Council meeting along with the before and after photos and descriptions of the work completed.

Date Received: _____

CITY OF FORT WORTH
AMENDED POLICY FOR THE
URBAN VILLAGE STOREFRONT/FAÇADE IMPROVEMENT PROGRAM

I. GENERAL PURPOSE AND OBJECTIVES

A. The purpose of the Urban Village Storefront/Façade Improvement Program (“Façade Improvement Program”) is to encourage local businesses to improve storefronts/façades in eligible areas, and to promote commercial revitalization and economic development. The Façade Improvement Program is funded with revenues generated from the City-owned parking garage located under General Worth Square originally funded with Urban Development Action Grant (“UDAG”) funds. Revenues from the lease are deemed “Grant Revenues” under the UDAG Grant Agreement, and can only be spent on specific uses allowed by law.

B. The City of Fort Worth (“City”) may use Grant Revenues as follows:

1. for community or economic development activities eligible for assistance under Title I of the Housing and Community Development Act of 1974, 42 USC 5201 *et seq.*, as amended;
2. for projects that are located in a Community Development Block Grant (“CDBG”) eligible area; and
3. for projects that include private investment.

II. DEFINITIONS

“*Building*” means, for funding purposes, a contiguous structure with shared walls, not including firewalls.

“*Eligible Improvements*” means any construction or aesthetic alteration made to the side of the Building parallel to the primary right-of-way and improvements to the interior wall of the façade caused as a result of improvements to the façade, as approved by City staff through the application process.

“*Developer*” means a legal entity/party that enters into the Reimbursement Agreement with the City to receive funds from the Façade Improvement Program.

“*Façade*” means the portion of the Building parallel to the primary right-of-way as determined by City.

“*Owner*” means the legal owner of the property on which the Project is located.

“*Project*” means the City approved improvements to the Building eligible for Façade Improvement Program funds.

III. ELIGIBLE PROJECTS

A. Eligible Projects. In order for a Project to be considered for funding under the Façade Improvement Program, it must meet the following criteria:

1. The Project must be located in
 - a. a CDBG eligible area and
 - b. one of the following Urban Villages or located along commercial corridors within one half mile of the designated Urban Villages under the Program:
 - Six Points
 - Polytechnic/Wesleyan
 - Oakland Corners
 - Historic Handley
 - Berry/Stalcup
 - Near East Side
 - Evans and Rosedale
 - South Main
 - Hemphill/Berry
 - Historic Marine
2. The use of the property must be in compliance with the City's Zoning Ordinance.
3. The Developer:
 - a. must invest its own funds on Eligible Improvements;
 - b. must submit a complete application to the City;
 - c. must not be delinquent in paying property taxes for any property owned by the Developer; and
 - d. must not have any City liens filed against any property owned by the Developer, including but not limited to, weed liens, demolition liens, board-up/open structure liens and paving liens.
4. No delinquent taxes shall be owed for the property on which the Project is located.

IV. ELIGIBLE IMPROVEMENTS AND EXPENDITURES

A. Eligible Improvements. Eligible improvements are limited to the following:

1. signage attached to the facade;
2. painting;
3. siding;
4. brick/stone/masonry;
5. glass;
6. windows;
7. doors;
8. trim;
9. awnings;
10. structural improvements to façade; or
11. exterior lighting attached to the façade.

B. Ineligible Improvements:

1. exterior improvements located on the sides or rear of buildings;
2. interior improvements;
3. landscaping;
4. parking lots and/or paving;
5. sidewalks,
6. equipment;
7. permitting fees
8. architectural, survey or other professional fees; or
9. costs related to improvements not made on the façade.

V. SELECTION PROCESS

A. Application. A complete application with the application fee of \$50.00 must be submitted along with the following attachments:

1. proof of ownership and/or occupancy such as deed/lease; If the Developer does not own the property on which the Project is located, the Developer must provide proof satisfactory to City that the proposed improvements are allowed and authorized by the Owner;
2. detailed explanation of proposed improvements;
3. renderings, elevations, drawings etc. for proposed improvements;
4. photographs of existing conditions; and
5. construction cost breakdown that differentiates Eligible Improvements from other improvements if any.

B. Denied Applications.

1. Applications will be denied 30 days after submission if all required documentation is not received by the City.
2. Applicants will have 60 days after the date of denial to resubmit applications without paying a new application fee.

C. Design Review Committee. A Design Review Committee composed of City staff will review the complete application to ensure Project eligibility and feasibility. The Committee will develop guidelines and objectives for the Façade Improvement Program. Projects will be selected on a first come, first served basis of completed applications and will be approved based upon designs that meet the purpose and objectives of the Façade Improvement Program.

D. Applicants will be notified in writing of the City's decision.

E. If City staff denies the application, then Applicant may appeal the denial to the City's Community Development Council (CDC). The CDC will make the final determination for approval or denial of the application.

VI. REIMBURSEMENT OF ELIGIBLE FAÇADE IMPROVEMENTS

- A. Funding for a Project is subject to availability and will be allocated on a first come, first approved basis. Once an application is approved, in order to participate in Façade Improvement Program, a Reimbursement Agreement outlining the terms and conditions of City providing funds to the Project must be executed by the Owner. Funding for the Project will be set aside so long as construction permits are pulled or work has commenced on the façade within 180 days of Project approval.
- B. City shall reimburse \$1.00 for every \$3.00 spent by Developer on Eligible Improvements at the completion of the Project. City shall only reimburse for eligible façade improvements and shall not reimburse any funds spent on improvements made to other portions of the building.
- C. Each Project can receive a maximum of \$30,000 per building for Eligible Improvements.
- D. Funds will be paid to Developer after all improvements have been made and approved by City and the terms of the Reimbursement Agreement have been met.
- E. In order to receive funds, Developer must provide proof of expenditures for Eligible Improvements with supporting documentation which may include:
 - 1. itemized invoices that differentiate Eligible Improvements versus other improvements;
 - 2. cleared checks and/or bank statements;
 - 3. release of liens for the work performed, if any;
 - 4. certificate of occupancy;
 - 5. final inspection report from City; and
 - 6. photographs of completed Eligible Improvements.

VII. REQUIREMENTS FOR APPROVED PROJECTS

- A. **Approvals.** Prior to construction commencement, all federal, state, and/or local approvals necessary to complete the improvements must be provided. Approvals could include:
 - 1. City's Historic and Cultural Landmarks Commission;
 - 2. City's Zoning Commission;
 - 3. City's Urban Design Commission;
 - 4. City's Downtown Design Review Board;
 - 5. City's Plan Commission;
 - 6. City's Building Standards Commission; and
 - 7. Permitting.
- B. **Project Completion.** The completion date of the improvements to be constructed will be determined on a case by case basis, and will be included in the Reimbursement Agreement. If the Project is not completed by this date, then the Project will be ineligible for funding, but City staff in its sole discretion may extend this date upon written request from the Developer.

**GRAPEVINE TOWNSHIP REVITALIZATION PROJECT
GUIDELINES
FY2017-2018 GRANT PROGRAM**

*****PLEASE NOTE –
ALL GRANT APPLICATIONS MUST BE SUBMITTED VIA US MAIL ONLY
CERTIFIED WITH RETURN RECEIPT**

Purpose of the Grant Funds

The goals of the Grapevine Township Revitalization Grant Program, Inc. (GTRP) are to preserve the cultural heritage of the City of Grapevine through the preservation, restoration, rehabilitation and/or reconstruction of historic homes.

Application Process

Applicants must complete a grant application form and meet with GTRP Staff to discuss the proposed work.

Recommendations for grants will be presented to the Grapevine Township Revitalization Advisory Board for approval.

General Criteria

1. Grant funding is available for:
 - Owner-occupant residential uses: \$10,000 max. with a \$5,000 match (2/1 match)
 - Rental residential uses: \$5,000 max. with a \$5,000 match (1/1 match)

Notes: Priority will be given to owner-occupied grant applicants.

If an applicant does not have the funding necessary for a match, such applicant may request a waiver from the matching requirement. Said waiver will only be approved by the Board of Directors.

2. The Director of the Convention and Visitors Bureau may increase the above stated amount in cases where existing conditions of the residence require additional assistance or where the proposed work exceeds the goals and objectives of this grant program. The increase must receive final approval from the GTRP Board of Directors prior to becoming effective.
3. After grant award, any increase or decrease in construction expenses, including cost increases, change orders and overruns shall be determined and assumed by the Owner.
4. Grants are limited to exterior preservation, restoration, rehabilitation and/or reconstruction of historic homes in existing historic districts or homes determined eligible for Historic Landmark designation by the Grapevine Historic Preservation Commission. The residence must be located within the boundaries of the original township (refer to attached map) or designated a Historic Landmark Subdistrict on the city's official zoning

Exhibit A

maps. All proposed work must comply with the Secretary of the Interior's *Standards for the Rehabilitation of Historic Properties*-see attached.

5. Grant funding is **NOT** available for purchase or rental of tools, machinery, equipment or Owner's time spent on work.
6. Each application will be evaluated on its merits as a viable project and on how it relates to the Township's goals. Applicants must describe the project and include drawings, specifications, photographs (historic, where available), budgets and schedule.
7. Owner agrees to sign a Preservation Agreement (see attached), which contains a reimbursement requirement in the event of sale or change in use of the property from owner-occupied to rental.
8. Owner agrees to designate their property with "H" overlay zoning designation through a Historic Landmark Subdistrict (see attached application) in accordance with the City of Grapevine's Comprehensive Zoning Ordinance, Section 39. A Historic Landmark property will be subject to Design Guidelines (see attached guidelines) for future exterior modifications.
9. The Applicant shall comply with all zoning and permitting requirements of the City of Grapevine Code of Ordinances and the Comprehensive Zoning Ordinance.

Funds

1. Grant funds must be used within 6 months from the date of the Preservation Agreement, or the grant becomes void.
2. Grant funding is handled on a reimbursement basis. Funds will only be disbursed when receipts of completed work are submitted for reimbursement and approved by the Township Coordinator.

The Grapevine Township Revitalization Program reserves the right to observe and monitor the project prior to payment and/or to make payment directly to a Contractor (where grant has been awarded without a matching requirement).

3. One hundred percent (100%) payment of the grant will be disbursed only when:
 - there is evidence that the project is completed, such as receipts for work completed (including copies of paid receipts) are received and approved by the Township Coordinator; and
 - the work passes inspection by the City of Grapevine Building Inspections Department (where required); and
 - after the property owner has submitted the Historic Landmark Subdistrict application form; and
 - after non-conforming work is modified where required by the Grapevine Historic Preservation Commission and/or the City of Grapevine Buildings Inspections Department (for achieving final inspection).

Exhibit A

4. Payment may be withheld if the work fails to meet the Secretary of the Interior's *Standards for the Rehabilitation of Historic Properties*.
5. The City of Grapevine is obligated, by the Internal Revenue Service, to request a W-9 Form and to file a Form 1099 for all funds to grant recipients. Please contact your tax consultant to determine if any additional tax liability may be incurred as a result of funds received from the Township Grant Program.

Repayment

Grant recipients must repay all of the funds if any of the following circumstances occurs within one (1) year of completion of the project:

- The building is not maintained to City of Grapevine Building Code.
- Historic Landmark designation is removed.
- Property changes from residential use to another.
- Owner performs or arranges for other work (not under this Agreement) materially detracting from the historic character or fabric of the exterior of the house without a Certificate of Appropriateness.
- Property is sold or conveyed to another.

Grant recipients who receive grant funding based on owner-occupied residential use of the property must repay twenty five percent (25%) of the grant amount if the owner-occupied status of the property changes to rental.

Required Submittals

1. A completed GTRP Grant Application with necessary signatures and budget where required on the application.
2. A completed Historic Landmark Subdistrict Application form with necessary signatures, notarized where required. A Notary Public is available, at no charge, in City Hall.
3. Proof of ownership, copy of deed. If application is submitted by someone other than Owner, please submit documentation establishing permission to work on property.
4. Proof of insurance, casualty, fire and federal flood insurance, if applicable.
5. Plans and specifications (if available or needed) of proposed work.
6. Historic documentation. Historic photographs (if available) or other documentation (i.e. drawings, sketches). Identify approximate date of documentation.

Miscellaneous

The GTRP Grant program begins on October 1 and ends on September 30 of each year. Applicants may reapply for funding for a project in a subsequent year if funds were unavailable during the current grant year.

Exhibit A

Those who have projects published agree to acknowledge the support of the City of Grapevine and the Grapevine Township Revitalization Project, Inc. It is also understood that the Grapevine Township Revitalization Program may seek public recognition for its contribution to any grants funded project.

Applications are available from David Klempin, Grapevine Township Revitalization Program, Inc., 636 South Main Street, Grapevine, Texas 76051. TELEPHONE: 410-3197. Email: dklempin@grapevinetexas.gov . All materials submitted become the property of the City of Grapevine.

Exhibit D

**GRAPEVINE TOWNSHIP REVITALIZATION PROJECT
PRESERVATION AGREEMENT
FY2016-2017 GRANT PROGRAM**

Whereas this Preservation Agreement (Agreement) is entered into between the Grapevine Township Revitalization Project, Inc. (Township) and _____ (Owner); and

Whereas the Owner will use funds made available through the Township Revitalization Grant Program (Program) for exterior preservation, restoration, rehabilitation and/or reconstruction (Work) of the historic _____ House, which is owned by the Owner; and

Whereas the purpose of this agreement is to set forth the responsibilities of the Township and the Owner in the payment, construction and reporting of the Work; and

Whereas the Owner has made application under the Program for financial assistance for Work to the _____ House, which is located at _____ an officially designated landmark or property eligible for designation as a Historic Landmark Subdistrict in the City of Grapevine; and

Whereas such application was recommended for \$ _____ by the Township Advisory Board on _____, 20__ and

Whereas the Owner will commence work on or about _____, 20__ now therefore,

Be it agreed by the Township and the Owner as follows:

Term

The term of this Agreement shall commence on the latest date of execution shown hereon and shall terminate one (1) year following the date of completion of the Work.

Amount and Scope

The Township shall pay to the Owner \$ _____ for the Work which shall consist of:

- | | |
|---------|---------|
| ▪ _____ | ▪ _____ |
| ▪ _____ | ▪ _____ |
| ▪ _____ | ▪ _____ |

Any increase or decrease in the construction costs, including cost increases, change orders, and overruns shall be determined and assumed by the Owner. Payment to the Owner shall be made as follows:

- after the Work is completed (copies of paid receipts are received), and
- after the Work passes final inspection by the City of Grapevine Buildings Inspections Department (where required), and
- after the property owner has submitted the Historic Landmark Subdistrict application form, and
- after non-conforming work (if any) is corrected where required by the Township and/or the City of Grapevine Building Inspections Department (for achieving final inspection).

Exhibit D

Maintenance of Zoning

The Owner agrees to initiate and designate their property a City of Grapevine Historic Landmark Subdistrict in accordance with Section 39 of the City of Grapevine Comprehensive Zoning Ordinance. If the residence is already a Historic Landmark, the Owner shall maintain the Historic Landmark status of the _____ House.

Repayment

The Owner shall promptly repay all amounts paid by the Township in the event that during the term of this agreement:

1. The residence is not maintained to City of Grapevine Building Code.
2. Historic Landmark designation is removed.
3. Property changes from residential use to another use.
4. Property is sold or conveyed to another owner.
5. Owner performs or arranges for other work (not under this Agreement) materially detracting from the historic character or fabric of the exterior of the house.

Grant recipients who receive grant funding based on owner-occupied residential use of the property must repay twenty five percent (25%) of the grant amount if the owner-occupied status of the property changes to rental.

Insurance, Liability and Indemnification

The Owner is prohibited from expending funds made available through the Program to purchase any insurance regarding the Work under this Agreement. The Owner shall carry casualty, fire and federal flood insurance (if applicable) at a level acceptable to the Township, and shall provide proof of same to the Township upon request.

The Owner acknowledges that he/she has read the guidelines for the grant program included with the application and agree to all of the terms and conditions contained in the guidelines and further agrees that any contractors hired for this project will hold contractors licenses for the City of Grapevine.

The Owner acknowledges that the Township is merely granting funds in connection with the work or project, and that neither the Township, the Grapevine Historic Preservation Commission or the City of Grapevine is or will be responsible for satisfactory performance of the work, or payment for the same beyond the grant by the Township. The Owner also acknowledges that he/she is solely responsible for selecting any contractors hired in connection with the project and in requiring satisfactory performance by such contractor.

The Owner agrees to indemnify and hold harmless the Township, the Historic Preservation Commission and the City of Grapevine, its agents, servants, employees, and officers against losses, costs, damages, expenses and liabilities of any nature directly or indirectly resulting from or arising out of or relating to the Township's acceptance, consideration, approval or disapproval of this agreement and the issuance or non-issuance of a grant, or any work performed in connection with this Agreement.

Exhibit D

Notice

The Owner shall provide the Township with at least two (2) weeks notice of any intended transfer of title, any encumbrance on title or pending legal action which may result in foreclosure of property. Notice or correspondence shall be sent to:

Grapevine Township Revitalization Project, Inc.
636 South Main Street
Grapevine, Texas 76051

Acknowledgement

The Owner shall, at Township's expense, allow for installation of a durable sign visible to the passing public that identifies the house and acknowledges that assistance has been provided through the Township and City of Grapevine.

Assignment

The terms of this agreement shall be binding on the Owner's successors and assigns and shall run with the property for the term of the agreement.

Executed this _____ day of _____, 20__.

Bruno Rumbelow, President
Grapevine Township Revitalization Project, Inc.

Property Owner
Address

Approved as to Form:

City Attorney

Exhibit D

THE STATE OF _____

COUNTY OF _____

BEFORE ME _____ ON THIS DAY PERSONALLY APPEARED

_____ KNOWN TO ME (OR PROVED TO ME ON THE OATH OF CARD OR OTHER DOCUMENT) TO BE THE PERSON WHOSE NAME IS SUBSCRIBED TO THE FOREGOING INSTRUMENT AND ACKNOWLEDGED TO ME THAT HE EXECUTED THE SAME FOR THE PURPOSES AND CONSIDERATION THEREIN EXPRESSED.

(SEAL) GIVEN UNDER MY HAND AND SEAL OF OFFICE THIS _____ DAY OF

_____, A.D. _____.

NOTARY IN AND FOR STATE OF TEXAS

DATE OF LICENSE EXPIRATION

THE STATE OF _____

COUNTY OF _____

BEFORE ME _____ ON THIS DAY PERSONALLY APPEARED

_____ KNOWN TO ME (OR PROVED TO ME ON THE OATH OF CARD OR OTHER DOCUMENT) TO BE THE PERSON WHOSE NAME IS SUBSCRIBED TO THE FOREGOING INSTRUMENT AND ACKNOWLEDGED TO ME THAT HE EXECUTED THE SAME FOR THE PURPOSES AND CONSIDERATION THEREIN EXPRESSED.

(SEAL) GIVEN UNDER MY HAND AND SEAL OF OFFICE THIS _____ DAY OF

_____, A.D. _____.

NOTARY IN AND FOR STATE OF TEXAS

DATE OF LICENSE EXPIRATION

Old Town Keller Facade Improvement Matching Grant Program

Share & Bookmark Font Size:

On April 21, 2009, the Keller City Council passed the Guidelines and Criteria for the Old Town Keller (OTK) Façade Improvement Matching Grant Program to encourage Old Town Keller business owners to make façade improvements to enhance and revitalize the area.



The program provides matching grants in the form of a reimbursement of up to \$5,000 for eligible improvements to façades in Old Town Keller. Participants are eligible for up to one grant in a twelve (12) month period from completion of previous grant. The City of Keller building permit fees related to the facade improvements will be waived for applicants meeting the \$5,000 match threshold.

Eligibility:

- Must be an existing building located in the Old Town Keller Overlay District (see Map of the Old Town Keller Overlay District below).
- Eligible facade improvements shall not begin before the application is considered by City Council.
- Improvements must comply with all applicable state and local code requirements.
- Improvements must comply with the Old Town Keller Overlay District design standards (see Unified Development Code Old Town Keller Overlay District Standards below).
- Improvements must be on the exterior and visible to the public (street, parking area, or public park).
- Buildings with multiple tenants are eligible for one (1) grant in a twelve (12) month period from completion of previous grant.
- Buildings being utilized as a residence within the Old Town Keller Overlay District are not eligible for this program unless the building is being converted from a residential use to a retail use.

Eligible Improvements Include (but are not limited to):

-
- Façade facelift: Painting, trim work, cladding
- Front porch additions and enhancements
- New or enhanced attached signage and/or awnings
- Detached signage
- Exterior lighting
- New storefronts
- Window replacement and window framing
- Hardscape improvements such as sidewalk pavers, concrete off-street parking, fencing visible to the public, and lamp posts.

Ineligible improvements include (but are not limited to):

- Interior improvements
- Any facades not visible to the public (street, parking area, or park)
- Roof repair
- New buildings or new building additions other than exterior additions such as porches and entry features
- Plantings or landscaping
- Outdoor furnishings unless permanently affixed to the building

[Download the Unified Development Code Old Town Keller Overlay District Standards \(PDF\)](#)

[Download Map of the Old Town Keller Overlay District \(PDF\)](#)

Application Requirements:

- Completed grant application signed by the applicant and the owner of the property (if

different from the applicant).

- Cost Proposals: Two (2) written cost proposals from bonafide tradespeople, contractors, or suppliers. **One (1) cost proposal must be from a contractor or supplier whose business is located within the City of Keller city limits (where applicable).**
- Contractor Qualification: One (1) completed "Statement of Contractor's Qualifications" form for each cost proposal. Contractors must be registered with the City of Keller.
- Exterior photo(s) of the building.
- Written description of proposal.
- Drawings or renderings of proposal.

Download the OTK Facade Improvement Matching Grant Program Application (PDF)

Download the Contractor Qualification Form (PDF)

Program Guidelines:

- Submission of an application does not guarantee approval.
- All eligibility requirements must be met to be considered for the grant program.
- Only complete applications will be considered by the Keller City Council for approval. Incomplete applications which are missing required application materials will not be considered and shall expire after six (6) months. The six (6) month time period will begin on the date of the most recent staff correspondence with the applicant. A new completed application shall be submitted in order to resume activity on a grant application.
- **Grants will be reviewed and considered by the Keller City Council on a first-come, first-served basis until all available grant funds have been allocated.**
- Appropriate permits must be obtained prior to beginning construction.
- A Site Plan must be approved by the City for a building being converted from a residential use to a retail/office use. Please contact the Community Development Department for further information regarding the Site Plan process.

- Construction of improvements must commence within ninety (90) days of grant application approval and must be completed within one (1) year of grant application approval. The applicant may request a one (1) time thirty (30) day extension for construction commencement and a one (1) time (6) month extension to complete the project from the Economic Development Department.
- Any changes or modifications to the approved grant application shall be approved by City Council.
- Payment of the matching grant shall be in the form of a reimbursement of fifty percent (50%) of the total cost of the improvements to a maximum of five thousand dollars (\$5,000).
- Payment will be made after all work is satisfactorily completed according to the terms of the approved grant application and all costs are documented with receipts and/or invoices. Payment will not be made for any work completed before the grant is considered by City Council.
- A completed W-9 Form (Request for Taxpayer Identification Number and Certification) provided by the Internal Revenue Service (IRS) will be required by the property owner prior to any payment.
- Improvements completed under the Old Town Keller Façade Improvement Matching Grant Program shall become permanent fixtures of the building and shall not be removed or altered for a period of five (5) years without the express consent of the City of Keller.

Program Case Studies:

Since the adoption of the Old Town Keller Facade Improvement Matching Grant Program, the City of Keller has provided eighteen (18) businesses with facade improvement grants to assist in the enhancement of their buildings. A document illustrating these projects is provided below.

[Download Old Town Keller Facade Improvement Matching Grant projects \(PDF\)](#)

For questions and more information about the Old Town Keller Facade Improvement Matching Grant Program, please contact the Economic Development Department:

Phone: 817-743-4130

Fax: 817-743-4195
Email: economicdevelopment@cityofkeller.com



Old Town Keller Façade Improvement Matching Grant Program





Old Town Keller Façade Improvement Matching Grant Program

ABOUT THE PROGRAM

On April 12, 2009, the Keller City Council passed the Guidelines and Criteria for the Old Town Keller (OTK) Façade Improvement Matching Grant Program to encourage Old Town Keller business owners to make façade improvements to enhance and revitalize the Old Town Keller area.

The program provides matching grants in the form of reimbursement of up to \$5,000.00 for eligible improvements to facades in Old Town Keller. Participants are eligible for up to one grant in a twelve (12) month period from completion of previous grant. The City of Keller building fees will be waived for applicants meeting the \$5,000 match threshold.

Eligible improvements include (but are not limited to):

- Façade facelift: painting, trim work, cladding
- Front porch additions and enhancements
- New or enhanced signage and/or awnings
- Detached signage
- Exterior lighting
- New storefronts
- Window replacement and window framing
- Hardscape improvements such as sidewalk pavers, concrete off-street parking, fencing visible to the public, and lamp posts



FOR MORE INFORMATION

www.kellereconomicdevelopment.com

Eligibility

- Must be an existing building located in the Old Town Keller Overlay District.
- Improvements must comply with all applicable state and local code requirements.
- Improvements must comply with the Old Town Keller Overlay District design standards.
- Improvements must be on the exterior and visible to the public.
- Buildings with multiple tenants are eligible for one (1) grant in a twelve (12) month period from completion of previous grant.
- Buildings being utilized as a residence within the Old Town Keller Overlay District are not eligible for this program unless the building is being converted from a residential use to a retail use.

Ineligible improvements include (but are not limited to):

- Interior improvements
- Any facades not visible to the public (street, parking area, or park)
- Roof repair
- New buildings or new building additions other than exterior additions such as porches and entry features
- Plantings or landscaping
- Outdoor furnishings unless permanently affixed to the building

PROGRAM SUCCESS

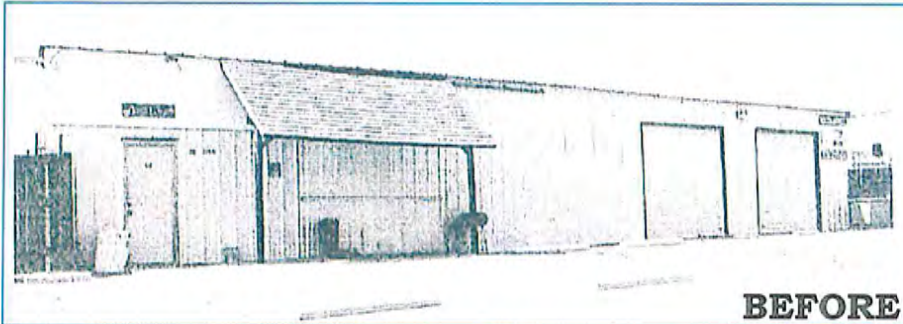
The City of Keller has awarded twenty-one (21) façade improvement matching grants to businesses and organizations within Old Town Keller. Seventeen (17) projects have been completed and have received grant funding. The seventeen (17) completed projects total \$300,139.03 worth of improvements. The City of Keller has issued a total of \$58,444 in grant funding to these seventeen (17) business owners for the reimbursement of their completed projects.

Four (4) projects are currently undergoing façade improvements which total approximately \$159,991.11. The City of Keller will issue grant reimbursement for each of these businesses at the time of project completion.



Old Town Keller Façade Improvement Matching Grant Program

COMPLETED PROJECTS



BEFORE

Total cost of exterior improvements: \$15,689.83

- Constructed wood façade on existing metal building
- Removed metal garage doors and replaced with windows and storefront doors
- Added awnings and exterior lighting
- Installed new signage

B&B Laundromat

108 Lamar Street

Grant Amount: \$5,0000.00
Approved by City Council on
June 16, 2009



AFTER



BEFORE

Christian Life Center

129 Pecan Street

Grant Amount: \$4,636.50
Approved by City Council on June 16, 2009



AFTER

Total cost of exterior improvements: \$9,723.00

- Constructed new awning/porch addition



Old Town Keller Façade Improvement Matching Grant Program

COMPLETED PROJECTS



AFTER

Fusion Church

111 West Vine Street

Grant Amount: \$1,400.00

Approved by City Council on June 16, 2009

Total cost of exterior improvements: \$2,800.00

- Installed exterior door on west side of building
- Painted exterior façade



BEFORE



AFTER

Lovera Athletics

116 West Keller
Parkway

Grant Amount:

\$5,000.00

Approved by City
Council on June 16, 2009

Total cost of exterior
improvements:

\$14,100.00

- Constructed brick façade over metal building
- Repaired existing doors and windows
- Installed metal awnings
- Painted exterior façade and mural
- Installed new signage



AFTER



Old Town Keller Façade Improvement Matching Grant Program

COMPLETED PROJECTS

Keller Church of Christ Monument Sign 205 South Elm Street

Grant Amount: \$5,000.00
Approved by City Council on September 15, 2009



BEFORE



AFTER

Total cost of improvements:
\$12,000.00
• Installed new monument sign



BEFORE

Artisans Alley
148 South Main Street
Grant Amount: \$5,000.00
Approved by City Council on March 23, 2010

Total cost of exterior
improvements:
\$12,360.00

- Removed wood façade and repaired existing masonry façade
- Installed new windows
- Repaired window casings
- Painted exterior façade



AFTER



Old Town Keller Façade Improvement Matching Grant Program

COMPLETED PROJECTS

Main and Vine

163 South Main Street

Grant Amount: \$5,000.00

Approved by City Council on May 4, 2010



Total cost of exterior improvements: \$12,020.56

- Repaired existing masonry façade
- Replaced awnings
- Replaced and repaired doors and windows
- Installed new signage
- Painted exterior façade



Ann Gibson Insurance

Agency

164 South
Main Street

Grant Amount:

\$3,159.29

Approved by
City Council on
July 6, 2010

Total cost of exterior improvements: \$6,318.58

- Removed and repaired stucco on exterior of building
- Removed and repaired awnings
- Painted exterior façade



Old Town Keller Façade Improvement Matching Grant Program

COMPLETED PROJECTS

Old Town Keller Professional Center

203 Lorine Street

Grant Amount: \$5,000.00

Approved by City Council on July 6, 2010



BEFORE



AFTER

Total cost of exterior improvements: \$12,325.00

- Repaired and replaced front porch, handicapped ramp, and stairs
- Repaired front yard and driveway fencing
- Painted exterior façade

322 & 324 S. Elm Street Office

322 & 324 S. Elm Street

Grant Amount: \$1,125.00

Approved by City Council on
October 5, 2010



AFTER

Total cost of exterior improvements:

\$2,250.00

- Installed new fabric awnings



BEFORE





Old Town Keller Façade Improvement Matching Grant Program

COMPLETED PROJECTS

Keller Tavern

128 South Main Street

Grant Amount: \$5,000.00

Approved by City Council on March 1, 2011



BEFORE—FRONT



BEFORE—REAR



AFTER—FRONT



AFTER—REAR

Total cost of exterior improvements: \$160,000.00

- Removal of existing white front façade to expose the original storefront
- Repaired and replaced existing siding
- Installed new windows and restaurant doors
- Installed new exterior lighting and building signage
- Construction of a new 700 square-foot addition
- Construction of off-site parking
- Construction of outdoor patio and walkway



CITY OF KELLER ECONOMIC DEVELOPMENT



Old Town Keller Façade Improvement Matching Grant Program

COMPLETED PROJECTS



BEFORE

The Durden Law Firm

131 East Vine Street

Grant Amount: \$5,000.00

Approved by City Council on October 5, 2010

Total cost of exterior improvements:

\$24,298.58

- Conversion of residential structure to an office
- Removed carport, front porch, and side-entry utility structure along the east side of building
- Construction of a new front porch
- Removed the green fiberboard siding to expose the ship-lap siding. Repaired and replaced siding
- Painted exterior façade



AFTER



BEFORE

Dr. Kelly Goodness and Associates

121 Olive Street

Grant Amount: \$3,719.00

Approved by City Council on October 4, 2011

Total cost of exterior improvements:

\$7,439.06

- Removed and repaired wood on exterior of building
- Removed and replaced awnings
- Removed and replaced front door
- Painted exterior façade

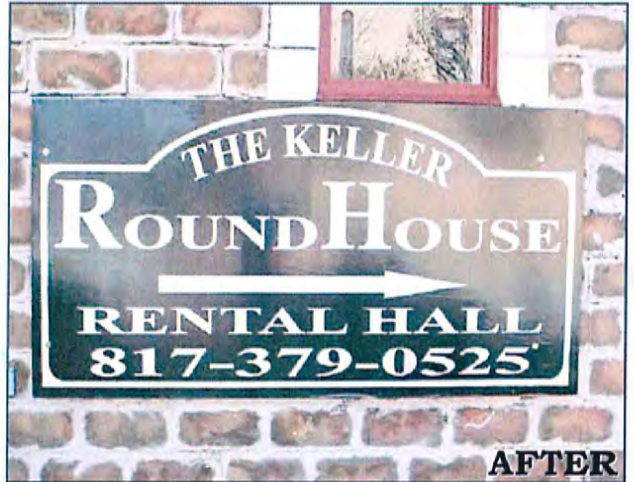
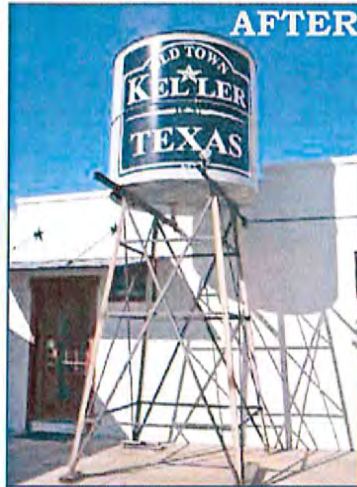


AFTER



Old Town Keller Façade Improvement Matching Grant Program

COMPLETED PROJECTS



Lee Brothers Land & Cattle

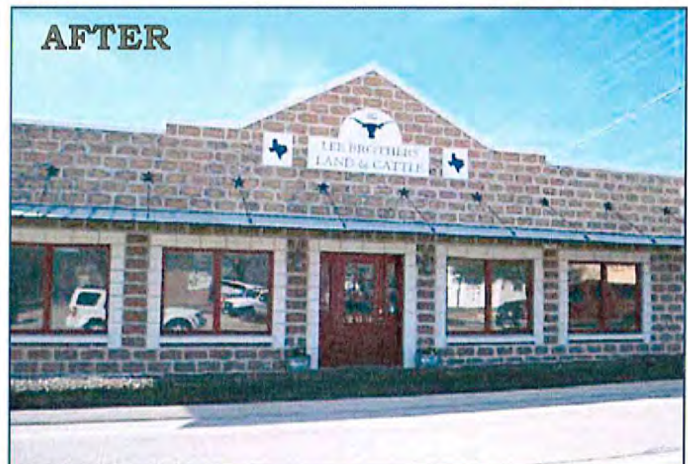
200 South Main Street

Grant Amount: \$925.00

Approved by City Council on November 1, 2011

Total cost of exterior improvements:
\$1,850.00

- Added signage to building and historical water tower
- Added lighting to historical water tower





Old Town Keller Façade Improvement Matching Grant Program

COMPLETED PROJECTS



Turner & Lee Grocery Mercantile 136 Olive Street

Grant Amount: \$625.00

Approved by City Council on November 1, 2011

Total cost of exterior improvements:
\$1,250.00

- Painted exterior facade



Christy's Corner Boutique 138 Olive Street

Grant Amount: \$2,147.50

Approved by City Council on November 1, 2011

Total cost of exterior improvements:
\$4,295.00

- Painted exterior facade



Old Town Keller Façade Improvement Matching Grant Program

COMPLETED PROJECTS



BEFORE



AFTER

The Round House
107 West Vine Street

Grant Amount: \$706.71

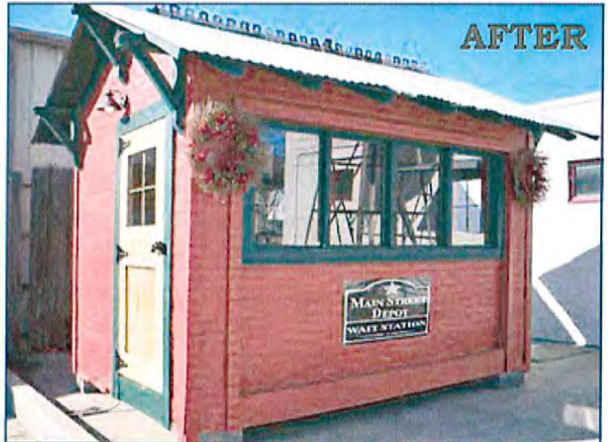
Approved by City Council on November 1, 2011

Total cost of exterior improvements:
\$1,413.42

- Removed and replaced awning
- Removed and replaced signage on building



BEFORE



AFTER

Total cost of exterior improvements:
\$4,920.00

- Adding signage, windows, doors, and lighting to historical wait station
- Adding signage
- Re-stripping parking lot (hardscape improvements)

Main Street Depot
204 South Main Street

Grant Amount: \$2,460.00
pending completion of project

Approved by City Council on
November 1, 2011



Old Town Keller Façade Improvement Matching Grant Program

UNDER CONSTRUCTION PROJECTS



Bronson Rock Burgers and Beer
250 South Main Street

Grant Amount: \$5,000.00 *pending completion of project*

Approved by City Council on January 18, 2011

Total cost of exterior improvements: \$100,000.00

- Repairing filling station's original building exterior
- Installation of stucco building material on the white metal building
- Painting exterior facade
- Installation of new windows and restaurant doors
- Installation of new exterior lighting and building signage
- Construction of a new 100 square-foot addition
- Construction of W. Pecan Street and off-site parking
- Construction of on-site parking with pedestrian pavers
- Construction of two outdoor patios with fencing





Old Town Keller Façade Improvement Matching Grant Program

UNDER CONSTRUCTION PROJECTS



BEFORE

Total cost of exterior improvements: \$51,791.13

- Removing and replacing exterior siding
- Removing and replacing exterior windows and window trims
- Painting exterior facade

The Carel Corporation

136 Pecan Street

Grant Amount: \$1,639.99
pending completion of project

Approved by City Council on January 17, 2012



BEFORE

Total cost of exterior improvements: \$3,279.98

- Adding exterior lighting to building

Smartphone users:
Scan this code to
learn more about
the program!



FOR MORE INFORMATION

Economic Development

817.743.4130

economicdevelopment@cityofkeller.com

www.kellereconomicdevelopment.com



Historic District Reimbursable Façade Improvement Grant

(Phase II)

APPLICATION PACKET

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Introduction

The City of Killeen seeks to create high-impact visual improvements to enhance the image of downtown through the historic restoration and rehabilitation of commercial storefronts located in the Historic Overlay District. As an economic incentive, the City has designed the following reimbursable façade grant program.

Phase II of the City of Killeen Façade Improvement Program (FIP) is a single payment reimbursement to property owners on an 80/20 matching basis up to \$10,000 per principal façade grant with a maximum payout of \$20,000 for a dual principal facade.

Grants are available on a first come, first served basis until total funds are depleted. No grants will be awarded for work that has already been done. All submitted work must comply with the Secretary of the Interior's Standards for Rehabilitation (see page 9), Historic District Design Guidelines, and the Historic Overlay District standards and be approved by the City of Killeen.

Application Instructions

Applicants should review the program guidelines, submit the Application with required documents, and follow the application process steps enclosed in this application packet.

Prior to any work being initiated, the attached Application must be submitted with required supporting documents to Planning and Development Services for review by staff at the City Hall Annex building (200 East Avenue D, 2nd floor).

If you have any questions, please contact the Revitalization Planner at (254) 501-7641.

**City of Killeen Planning & Development Services
200 East Avenue D, 2nd Floor
Killeen, TX 76540-1329
Phone: (254) 501-7641**

PROGRAM GUIDELINES

Eligible Properties and Owners

1. An Applicant must be the property owner within the Historic Overlay District as identified in the attached map (pg. 7);
2. **Only non-residential, commercial, retail or office buildings;**
3. No application will be accepted for any project from a property owner who is in arrears in the payment of property taxes, special assessments, or other liabilities due the City;
4. Property must have an active/current business status (a business in operation) **OR** that will be occupied by an owner-operated business within one hundred eighty-one (181) days of completion of the façade improvement;
5. Property owner must have insurance equal to or greater than the appraised value of the building [based upon the Bell County Appraisal District most recent tax assessment]; and
6. Property owner must have had no reported incidence involving the authority of the Police or Fire department in the most recent twelve (12) months prior to application submittal.

Eligible Improvements and Costs

The minimum standards of façade improvements in the Historic Overlay District require compliance with the:

1. Secretary of the Interior's Standards for Rehabilitation (see attached, pg. 9);
2. Historic District Design Guidelines;
3. Historic Overlay District Standards; and
4. City Municipal Code and Ordinances.

Eligible façade improvements include all costs directly attributable to the improvements of the principal [architectural, street-facing, front] façade or a dual principal [a building containing a façade facing one or more street sides] façade. Examples of eligible façade improvements include:

- Façade restoration;
- Window, door or awning replacements;
- Exterior painting; and
- Other exterior storefront improvements including incidental improvements associated with achieving a completed project to include: exterior cleaning, removal of old signs, awnings and other exterior clutter.

Additional improvements may be determined to be eligible on a case-by-case basis for those properties that:

- Have a rear facade which contains a primary entrance for the public;
- Have a non-principal façade, which is also visible from the public right-of-way; and
- Satisfy other determinations approved by the Heritage Preservation Board.

Ineligible Improvements include, but are not necessarily limited to:

- New construction or additions;
- Interior improvements;
- Improvements completed or started prior to application approval for this program;
- Security systems, fire alarms/systems, structural upgrades, vinyl or aluminum siding;
- Removal of physical or visually architectural features of the building; and
- Paving, sidewalk repair or replacement.

Grant Guidelines and Requirements

- **Minimum Improvement Standards.** Applicants receiving the grant must have façade improvements that conform to the Secretary of the Interior's Standards for Rehabilitation, Historic District Design Guidelines, Historic Overlay District standards, and Municipal Code of Ordinances.
- **Maximum Grant.** The grant is a single payment reimbursement on an 80/20 matching basis (80% City funds/20% property owner funds) with a maximum grant of \$20,000 from City funds with \$10,000 per front facing façade.
- **City Permit and Approval.** The applicant is required to obtain all required City permits and City approvals prior to the commencement of any work.
- **Contact HUB Contractors.** Applicants must request a quote from at least two historically underutilized businesses in Bell County for projects that exceed \$3,000 in improvements.
- **No Prior Obligations.** Applicants must have all property (real and personal) taxes, utilities obligations and other obligations to the City paid in full at the time of application submittal.
- **Inspection.** The City of Killeen Planning and Development Services Department [including Code Enforcement] will inspect the project site [interior/exterior] for code compliance and will also inspect the work performed by the contractor, as required by State or local building codes and/or ordinances, at the completion of the project. These inspections will ensure compliance with all components of the Façade Improvement Grant Program.
- **Grants per Applicant.** A maximum of \$205,000 will be awarded under this program to an applicant each Fiscal Year (October 1 to September 30). Priority will be given to applicants who have not yet received a façade improvement grant.
- **Cost Evaluation.** The Heritage Preservation Officer and/or Heritage Preservation Board will examine the total cost of any proposed façade improvement to ensure that a grant is warranted.
- **Façade Maintenance.** Grant recipients hereby agree to properly maintain the improvements at all times. Grant funds must be replaced if the terms of the grant are not satisfied.
- **Code Compliance.** The Applicant, by submission of this Application, represents the construction, described within the Application, shall be used in a building which is in compliance with all codes and ordinances.

Approval Criteria

Approval of applications shall be based on the funds available with the highest priority given to applications in Category 1, and then, in descending order, with applications in Category 5 having the lowest priority. Grants will be awarded on a first-come, first-served basis with the following criteria prioritization applied when multiple applications have been submitted simultaneously. The Heritage Preservation Officer and, in some instances, the Heritage Preservation Board use discretion in awarding these facade grants and have the right not to approve any application.

Category 1. Code Compliance. Projects that bring windows or other façade elements into compliance with the Historic Overlay District standards, the Historic District Design Guidelines and Municipal Codes and Ordinances.

Category 2. Historic Preservation Priority. Projects listed as "high" or "medium" priority in the Historic Resources Survey¹.

¹ Killeen Historic Resources Survey 2008, Preservation Central Inc

- Category 3. Visual Impact.** Projects that substantially enhance the visible appearance of the façade to pedestrians and the traveling public.
- Category 4. Other Improvements.** Projects that include new façade improvements whose owners wish to upgrade the appearance of the storefront.
- Category 5. Previous Recipients.** Additional Projects from businesses that have already received a City of Killeen facade grant in the past.

Application Process

The following steps will help guide you through the façade grant process.

1. **Determine Eligibility:** Review the guidelines in this application packet and set up an appointment with the Heritage Preservation Officer (HPO) to discuss project plans before applying for a permit or commencing the work. All applicants are required to present their grant reimbursement project to the HPO for review. No grants will be awarded for work that has already been initiated or completed. Contact the HPO at 254-501-6591 with any questions.
2. **Complete the Façade Improvement Grant Application** (attached) and obtain and enclose the following required items:
 - a. Scale drawing or photographs of proposed work;
 - b. Final color samples and materials to be used; and
 - c. At least three (3) contractor quotes
3. Applicants must request a quote from at least two historically underutilized businesses for projects that exceed \$3,000 in improvements.

- a. Applicants must request a quote from at least two historically underutilized businesses (HUB) located in Bell County for projects that exceed \$3,000 in total. For the HUB directory, log on to: www.window.state.tx.us/procurement/cmb1/hubonly.html

In the opening screen type in Bell in the "county" field and "submit search". If this list fails to identify a HUB vendor in Bell County that does this type of work, then you are exempt from having to get HUB vendor quotes.

Applicants should still provide three quotes with their application if the HUB listing search fails to provide a vendor that does this type of work. All quotes submitted by an Applicant must be current and dated no earlier than sixty (60) days prior to the Application submittal.

Quotes shall be submitted on the contractor's or project architect's letterhead and shall contain the contractor's name, address, and telephone number. Quotes shall be itemized in a manner that will allow the City staff to determine the quote components and authenticity of the quote. Any grant awarded shall be limited to the amount of the City's participation (80% match, up to a maximum of \$205,000), based on the lowest responsible estimator's quote.

If Applicant chooses to select a contractor that is not the lowest responsible estimator, as determined in the City's sole discretion, Applicant is advised, and, by the submission of this Application, hereby agrees that the City's participation shall not exceed 80% of the lowest responsible estimator's amount, up to \$105,000 per principal façade (\$20,000 max).

- b. Self-contracted work may be reimbursed for legitimate expenses, excluding labor and the cost of previously acquired materials/equipment.

4. **Submit your Façade Improvement Grant Application** with all required items to the Planning and Development Services Department at 200 East Avenue D (2nd floor). Applications with all required items will be reviewed by the HPO. The HPO has the authority to grant approval of the application if, in his or her opinion, there are no issues requiring consideration by the Heritage Preservation Board (HPB).
5. **The approval process** will include without limitation the following items:
 - a. The HPO will conduct a review of the application form, submitted items and issue approval, request revisions to project components, or determine whether further review and consideration by the HPB is necessary. All Façade Improvement Grant Applications must be approved and a permit must be issued prior to the initiation of any work, including construction and/or installation of any improvement.
 - b. The HPO shall only consider Applications that have been properly and fully completed and that contain all information required in the Application or additional information requested by City staff or the HPB.
 - c. No Applicant has a right to receive façade grant funds, and the City hereby expressly denies the creation or existence of any perceived property right to the same unless and until an application is approved in accordance with terms of this Application. The HPO and/or HPB shall consider any Application, utilizing their sole discretionary authority, to determine whether approval of a grant and the grant amount would be in the best interest of the Grant Program and the City. The review criteria may include, but shall not be limited to, compatibility with existing downtown structures, architectural design, streetscape objectives, and overall redevelopment of the Historic Overlay District.
 - d. Notwithstanding any provision in this Applicant to the contrary, final approval for any façade grant shall be vested in the City Council of the City of Killeen, at its sole discretion.
 - e. An Applicant who submits an Application that was denied by the HPO, HPB and/or the City Council shall not be eligible to re-submit a grant Application for six (6) months from the date the prior Application was finally denied.
 - f. If the proposed project is deemed inappropriate or incompatible with the Historic District Design Guidelines, Historic Overlay District Standards, or other Municipal Codes and Ordinances, the HPO will advise the Applicant accordingly and may recommend changes to the design. If the applicant submits a project design based upon the HPO's recommendations, the application will be reviewed a second time. If the Applicant disagrees with the HPO on any issue, the HPO shall refer the application to the HPB for resolution.
6. **Funding Commitment Letter:** Upon approval of the Façade Improvement Grant Application, the HPO or HPB will issue a Funding Commitment Letter (If you have not received a Funding Commitment Letter from the Planning and Development Services Department advising that your Application has been approved, your proposed improvements are not approved for funding or have been determined to be out of compliance with the City's design standards).
7. **Permit:** Following the issuance of the Funding Commitment Letter, Applicant must obtain a permit from the Building and Development Services Department (located in City Hall, 101 N. College Street) or via the internet at <http://www.ci.killeen.tx.us/>. Complete and submit the permit application to the Building and Development Services Department. The Permits and Inspections Department will notify you at such time the permit receives approval.

8. **Arrange for façade improvement construction** with selected contractor after receiving the Funding Commitment Letter and City permit. **Any changes to the approved façade improvements, materials, or other considerations must be approved by the HPO in advance, in writing, or the City may withdraw the funding commitment and disqualify the applicant.** Approved façade improvement grant funds are available to the applicant for six (6) months after grant approval, as indicated by the date of the Funding Commitment Letter. If no request for payment has been received following this period, the applicant forfeits any claim to the grant and may not reapply for another grant for one year.
9. **Reimbursement:** After the entire grant project has been completed, Applicant shall notify the Planning and Development Services Department that construction is complete and Applicant shall submit proof of payment through a paid receipt from the contractor-include copies of cancelled checks and/or credit card receipts; this begins the process of reimbursement to the applicant. The City will then inspect the property to verify that the façade improvements are consistent with the approved Façade Improvement Grant Application plans and is in full compliance with the permit before issuing a single payment reimbursement.

APPEAL PROCESS: If an applicant wants to appeal a decision made by the HPB, then the façade grant application will be brought to the City of Killeen City Council for review and City Council's determination shall be deemed the final action regarding the application.

If you have any questions, please contact the Planning and Development Services Department at (254) 501-7641.

Historic Overlay District Map



Historic Property Rehabilitation Tips

- Carefully examine old buildings for termites, wood rot and general deterioration.
- When repairing a building, do not cut expenses on the roof or the foundation.
- Carefully locate air-conditioning units to avoid water condensations on the sides of buildings. Condensing units should be supported from the masonry walls and not placed directly on the roof.
- The top brick cornices that project above the roof deteriorate rapidly unless they are capped with metal, terra cotta, stone or concrete.
- When mortar is missing or in poor repair, moisture will enter the walls and eventually may cause structural damage. Deteriorated mortar should be removed to a depth of at least three-fourths of an inch and replaced with new mortar that matches the old in color, texture and striking of the joint.
- Do not sandblast. Chemicals and/or water can remove dirt and paint without damaging the surface of the building.
- Do not paint too often; many times a building only needs mild washing.
- If the building has stone or brick that has never been painted, do not create a maintenance problem by painting it.
- Existing architectural details, including old wood doors, windows, ceilings, and trim work add to the character of a building and its resale value. Repair these features rather than remove them.
- Wood windows are reasonable to repair, if a specialist in window repair can be found. If the windows are missing, custom-made windows can be ordered for replacement in old buildings.
- Pressed metal ceiling panels are still being manufactured today with some of the same patterns installed originally. Deteriorated panels, therefore, can be replaced exactly.
- Do not use aluminum siding. It can hide water penetration into the walls and accelerate deterioration.
- Before rehabilitating a building façade, take a careful look at the structural aspects of the building. Develop a design that is compatible with neighboring buildings.
- Retain a sense of continuity by carrying exterior building design inside the structure.
- Demand quality.

Secretary of the Interior's Standards for Rehabilitation

Any proposed improvement project submitted by an Applicant shall demonstrate and incorporate an awareness of the Standards of Rehabilitation as follows:

1. Every reasonable effort shall be made to provide a compatible use for a property which requires minimal alteration of the building, structure or site and its environment, or to use a property for its original intended purpose.
2. The distinguishing original qualities or character of a building, structure, or site and its environment shall not be destroyed. The removal or alteration of any historic material or distinctive architectural features will disqualify any building from this program.
3. All building, structures, and sites shall be recognized as products of their own time. Alterations that have no historical basis and which seek to create an earlier appearance shall be discouraged and may disqualify any building from this program.
4. Changes which may have taken place in the course of time are evidence of the history and development of a building, structure, or site and its environment. These changes may have acquired significance in their own right, and this significance may be recognized and respected.
5. Deteriorated architectural features shall be repaired rather than replaced, wherever possible. In the event replacement is necessary, the new material should match the material being replaced in composition, design, color, texture and other visual qualities.
6. The surface cleaning of structures shall be undertaken with the gentlest means possible. Sandblasting and other cleaning methods that will change or damage the historic building materials shall not be undertaken.
7. Contemporary design for alteration and additions to existing properties shall not be discouraged when such alterations and additions do not destroy significant historical, architectural or cultural materials, and such design is compatible with the size, scale, color, material, and character of the property, neighborhood, or environment.
8. Whenever possible, new additions or alterations to structures shall be done in such a manner that if such addition or alterations were to be removed in the future, the essential form and integrity of the structure would be unimpaired. New additions should be compatible to the present structure.

Façade Improvement Grant Application (Phase II)

APPLICANT INFORMATION

Building Owner: _____ Date: _____

Mailing Address: _____

Building Address (if different than above): _____

Contact Name(s): _____ Email: _____

Contact Phone Number: _____ Fax Number: _____

BUILDING INFORMATION

Physical Address: _____

Property Legal Description: _____

Year of Construction: _____ Number of Stories: _____

Building Space Type (check one): ☐ Commercial, Retail, Restaurant ☐ Office ☐ Other

Building Insurance Information	9a. Insurance Agent Name:	9b. Agent Telephone Number:
	9c. Policy Number:	9d. Policy Effective Date:

Details of Planned Improvements: (attach additional paper if necessary)

ATTACH THE FOLLOWING REQUIRED DOCUMENTS (Estimate Analysis Form)

- ☐ Scaled drawings/plans of proposed work/color samples/description of materials to be used.
- ☐ Contractor Quotes/Bids (attach a minimum of three original proposals unless the work is self-contracted).

(1) Contractor's Name _____ Cost Estimate \$ _____

(2) Contractor's Name _____ Cost Estimate \$ _____

(3) Contractor's Name _____ Cost Estimate \$ _____

Quotes/bids submitted by an applicant must be current and dated no earlier than sixty (60) days prior to the Application request. Quotes/bids shall be submitted on the contractor's or project architect's letterhead and shall contain the contractors name, address, and telephone number.

Total Cost of Proposed Façade Project: \$ _____

Total Grant Amount Requested: \$ _____

Signature page follows.

Façade Improvement Grant Program Agreement Form

I have met with the Planning and Development Services Department, and I fully understand the Façade Improvement Grant procedures and details established by the City of Killeen. I intend to use this Grant program for the aforementioned renovation projects to forward the efforts of the downtown revitalization and heritage preservation program.

I affirm and understand that:

- a) The information submitted herein is true and accurate to the best of my knowledge.
- b) I have read and understand the City of Killeen's Façade Improvement Grant Program Guidelines and the Historic District Design Guidelines and agree to be bound by and abide by these conditions.
- c) I understand that receipt of a Façade Grant Funding Commitment Letter from the City of Killeen does not constitute application or approval for a City of Killeen permit.
- d) I understand that construction of proposed improvements cannot begin until the Heritage Preservation Officer (HPO) and/or Heritage Preservation Board (HPB) acts upon this Façade Grant Program application and issues a Funding Commitment Letter.
- e) I understand that any changes made to the approved façade improvements without the approval of the HPO or HPB will be cause for the City of Killeen to withdraw its funding commitment.
- f) I understand that the owner/applicant will be obligated to maintain the building improvements, assisted through this program for a period of five (5) years from the date of project completion.
- g) The Owner hereby agrees, as the Façade Improvement Program Applicant and property owner ("Owner"), that if the Façade Improvement Program proposal is awarded, a demand for repayment shall be made and a lien securing the interest of the City of Killeen funds will be placed on the real property requiring repayment of the City funds invested unless: 1) an active and legal commercial business is occupying and operating from the project site address within six (6) months of the date of the reimbursement payment from the City to the Owner; and 2) an active legal commercial business is operating on the project site for a period of five (5) years. In the event of lapses in active commercial activity at the project site due to business failure, lease termination or similar or unforeseen causes during this period, the time period shall be tolled and the owner shall take all measures reasonably necessary including, without limitation, advertising and actively seeking new tenants, to ensure that a replacement legal commercial business commences operation on the project site as soon as possible following cessation of the same. Upon business recommencement, the time period will again begin to lapse.

Business/Organization Name

Applicant's Signature

Date

Building Owner's Signature

Date

Downtown Revitalization Planner Approval

Date

Planning & Development Services Director Approval

Date

Preservation Incentive Program

City of Victoria

Section 1-1. Purpose

The City of Victoria finds that the protection, enhancement, and perpetuation of landmarks of historical importance and significance are necessary to promote the economic, cultural, educational and general welfare of the public. It is recognized that the historic resources of the City represent the unique confluence of time and place that have shaped the identity of generations of citizens, collectively and individually, and these resources constitute the heritage of the citizens of Victoria. This program is intended to:

- a) Protect, enhance, and preserve the historic resources and landmarks which represent distinctive elements of Victoria's historic, architectural, economic, ethnic, and social heritage by providing property owners an incentive for protecting their property;
- b) Stabilize and improve property values;
- c) Foster civic pride in the beauty and accomplishments of the past, and to promote the use of historic landmarks for the culture, education, and general welfare of the residents of Victoria; and
- d) Strengthen the economy of the city by protecting and enhancing the city's attractiveness to residents and visitors, as well as provide support and stimulus to business.

In order to facilitate the preservation of historical structures, the City of Victoria is offering incentives that will serve to improve existing properties and businesses within the four designated historic districts.

Section 1-2. Administration

The program will be administered by the City of Victoria Development Services Department.

Section 1-3. Eligibility Criteria

All of the following eligibility criteria must be met:

- a) Property must be listed on the Historic Resources Survey of Victoria OR must have been constructed more than 50 years prior to the date of application.
- b) Except as provided in subsection (c) below, eligible property must be within the one of the eligible historic districts (defined in Section 21-82(i) of the City Code). See attached map.
- c) Properties located outside of eligible historic districts may be considered for grant assistance under exceptional circumstances (e.g. properties of particular significance to the history of Victoria, or locations that would likely attract visitors as a historic tourism attraction).

- d) Property may be owner-occupied or tenant-occupied. In the case of a tenant-occupied structure, the applicant must have the owner's consent.
- e) Applicants are encouraged to follow the Secretary of the Interior's Standards for Rehabilitation (attached).
- f) All taxes and other government fees and assessments must be current on the property.
- g) Property can not be subject to an Order for Demolition.

Section 1-4. Types of Grant Assistance

Funding for this program is generated from Hotel Occupancy Tax (HOT) funds.

- a) Program assistance is available for two different types of work:
 - 1) Facade Restoration – Replacing windows, wall repairs, brick re-pointing, replacing and exposing transom windows, signage, and awnings. Grants are available with a cap of \$20,000.
 - 2) Other improvements may be allowed by on a case by case basis that are necessary to stabilize a structure, move a historic structure to another location within the historic districts or other locations as approved by City Council, and/or meet building code requirements. The maximum grant assistance available per property is limited to available funds as established by City Council.
- b) Grants will not be provided for work that is already completed.
- c) Funds will be provided on a 50/50 matching basis. In-kind contributions may be counted toward the match requirement.

Section 1-5. Grant Application Procedure

At the start of the fiscal year, the city will publish an announcement of funding availability. Applications will be received throughout the fiscal year, subject to the availability of funds.

- a) Property owner submits an application along with any required supporting documentation (i.e. drawings, total project cost estimate, photographs, contractor bids, tax certificate, etc.). Application is reviewed by Development Services Staff for completeness.
- b) After submittal of a grant request, a preliminary site visit will be made by Development Services staff. The site will be photographed and repairs/maintenance reviewed with the property owner.
- c) Applications will be reviewed and evaluated by a committee appointed by City Council and comprise of representatives from: Victoria County Historical Commission, Victoria

Preservation Inc (VPI) and City Council District #1 and #5. City representatives will be the City Attorney and the Development Services Director. The Director of Development Services will serve as the Chair. The Committee's recommendations will be forwarded to City Council for review and approval.

- d) City Council will decide which entities qualify for assistance based on the architectural value of their proposed projects to the City of Victoria, the compatibility of their proposed projects with the neighborhood surroundings, and the cost effectiveness of the proposed project in the relation to the amount the proposed grant.
- e) Property owner and City will execute a contract outlining the scope of work eligible for reimbursement.
- f) Work must be completed within two years from the date of the contract.
- g) Grants will be set up as on a reimbursement basis to the applicant. A maximum of four (4) draw requests are allowed.
- h) If at any time problems occur relating to the quality of work or work is not completed in accordance with the specifications outlined in the application and approval can not be granted, the contract can be terminated and the City will have no further obligation to the owner.
- i) Properties assisted through this program will be listed on the historical driving tour. The property owner will apply for designation on the National Register of Historic Places and the Texas Historical Marker program, as appropriate.

Secretary of Interior's Standards for Rehabilitation (36 CFR 67)

Grant recipients shall comply with the following standards when rehabilitating properties:

1. Every reasonable effort shall be made to provide a compatible use for a property which requires minimal alteration of the building, structure or site and its environment, or to use a property for its original intended purpose.
2. The distinguishing original qualities or character of a building, structure, or site and its environment shall not be destroyed. The removal or alteration of any historic material or distinctive architectural features will disqualify any building from this program.
3. All building, structures, and site shall be recognized as products of their own time. Alterations that have no historical basis and which seek to create an earlier appearance may disqualify any building from this program.
4. Changes which may have taken place in the course of time are evidence of the history and development of a building, structure, or site and its environment. These changes may have acquired significance in their own right, and this significance shall be recognized and respected.
5. Deteriorated architectural features shall be repaired rather than replaced, wherever possible. In the event replacement is necessary, the new material should match the material being replaced in composition, design, color, texture, and other visual qualities. Repair or replacement of missing architectural features should be based on accurate duplications of features, substantiated by historic, physical, or pictorial evidence.
6. The surface cleaning of structures shall be undertaken with the gentlest means possible. Sandblasting and other cleaning methods that will change or damage the historic building materials shall not be undertaken.
7. Contemporary design for alterations and additions to existing properties shall not be discouraged when such alterations and additions do not destroy significant historical, architectural or cultural materials, and such design is compatible with the size, scale, color, material, and character of the property, neighborhood, or environment.
8. Wherever possible, new additions or alterations to structures shall be done in such a manner that if such additions or alterations were to be removed in the future, the essential form and integrity of the structure would be unimpaired. New additions should be compatible to the present structure.

[illegible]



APPLICATION

Please return completed application with all required color samples of paint, awning, sign design, as well as drawings, contractor bids, property deed, tax certificate and photographs of the building's exterior facade to the City of Victoria Development Services Department.

Applicant Name: _____

Business Name: _____

Mailing Address: _____

Contact Phone: _____ Fax: _____

Building Owner: *(if different from applicant)* _____

Historical/Current Building Name: _____

Physical Building Address: _____ Year Built: _____

Type of Work: *(check all that apply)*

☐ Brick repointing/ wall repair

☐ Uncovering/replacing windows

☐ Sign

☐ Awning

☐ Other Improvements

Details of Planned Improvements for Grant: *(attach additional description if necessary)*

Total Estimated Cost of Proposed Project: _____

Amount of Grant Requested (No more than 50% of Total Cost): _____

I understand that if I am awarded a Preservation Incentive Program grant by the City of Victoria, any deviation from the approved project may result in the withdrawal of the grant.

Applicant Signature

Date

Building Owner's Signature

Date