

**CITY OF PHOENIX
HISTORIC PRESERVATION
LOW-INCOME HISTORIC HOUSING REHABILITATION PROGRAM
2009-2010 APPLICATION**

In completing the application, please be as concise as possible, read all questions before answering to avoid repetition and write legibly in pen or type. Note that you may not need to answer all questions, as they may not apply to your project.

Eligible participants include 501(c)3 organizations with a primary mission to provide affordable housing and/or neighborhood stabilization, property owners with an income at or below 80 percent of median household income for Maricopa County or owners of multi-family properties where at least 51 percent of the tenants meet these income qualifications. The program's main focus is to assist projects that substantially rehabilitate historic residential building exteriors.

80% household income limits:

1 person	2 people	3 people	4 people	5 people	6 people	7 people	8 people
\$36,900	\$42,150	\$47,450	\$52,700	\$56,900	\$61,150	\$65,350	\$69,550

I. APPLICANT INFORMATION

Applicant name: _____

Mailing address: _____

Daytime phone: _____

E-mail address: _____

Ownership Information

- If you are the **owner** of the property, have you been pre-qualified for the Comprehensive Housing Rehabilitation Program, Rental Rehabilitation Program or other income assisted housing program administered by the city? _____ Yes _____ No
- If you are the **owner** of the property, do you have verification from the city of your low-income status (at or below 80 percent of the median household income)? _____ Yes _____ No
- If you are the owner of a multi-family property do you have verification from the city that 51 percent of the tenants have an income at or below 80 percent of the median household income? _____ Yes _____ No

Verification by: _____
Name of City of Phoenix official
Date

- Are you a **non-profit organization** with 501(c)3 status and a mission to provide affordable housing and /or neighborhood stabilization? _____ Yes _____ No

II. PROPERTY INFORMATION

Property address: _____

Historic District (or name of Individually-listed building): _____

Current use of property: _____ Vacant _____ Single-family _____ Duplex _____ Other

III. PROJECT SUMMARY

1. Project Goals and Scope of Work. Please describe the project you are undertaking, including the number of units that will result from the completion of the project, and whether you or your organization intends to sell, rent or occupy the property. Identify all phases or sequence of work tasks for the entire proposed rehabilitation project, including all major work items such as interior, exterior, landscape and site work. Identify the portion(s) of the overall project that would utilize the Historic Preservation Office Low-Income Historic Housing Rehabilitation funds. The city Historic Preservation Office determines the eligibility of all proposed work items. Attach a separate sheet if necessary.

2. Preservation Ethic. Explain how the exterior rehabilitation work of the project will retain existing historic fabric or provide for use of appropriate alternative materials.

Eligible work items for the Low-Income Historic Housing Rehabilitation Program:

Eligible **exterior work** may include:

- Exterior wall repairs
- Roof repairs/replacement
- Foundation repairs
- Masonry/Stucco repairs
- Porch and step rehabilitation
- Cornices and parapet repairs
- Americans with Disabilities Act (ADA) alterations
- Exterior window and doors repairs
- Historic outbuildings/carport rehabilitation
- Reversal of previous inappropriate alterations
- Reconstruction of original architectural elements based on documentation/evidence
- Demolition of non-historic additions
- Re-painting (**only if** component of an eligible repair)

Interior work may be eligible **only if** necessary to stabilize or structurally support the building's historic exteriors.

Pre-agreement/architectural & engineering costs (soft costs) may qualify if they are related directly to eligible work, and if costs are incurred within two (2) years prior to and/or one (1) year after application date and amount to no more than 20 percent of the total funding request. This can include historic structure reports, site planning, feasibility studies, design work, and construction drawings and specifications.

The program does not fund new construction, additions, acquisitions, landscaping, fencing, site improvements or interior work (unless related to structural stabilization).

3. **Project Budget.** List all proposed exterior historic preservation bond funded work items and costs below. **IF you are a property owner or non-profit organization who will NOT receive funding assistance from another city program, you also must attach two (2) contractor bids** to substantiate all requested Historic Preservation (HP) funded items. Each bid should be for the same type of product or scope of work (i.e. both bids are for a wood shingle roof, both bids are for a dimensional shingle roof or both bids are for window repair). All cost estimates shall be listed on letterhead from the contractor or tradesperson and should include contact information (address, phone number and e-mail). *Choose one bid and contractor for each work item and list below.* The contractor or tradesperson selected must have experience with the work item they will complete. All "soft costs" (i.e. overhead, profit, taxes and fees) should be included in the total cost for each item listed below (you may need to break these costs out from the overall estimate if you only select some work items from a particular bid).

Please note that building permit fees, if any, are not eligible costs. Attach a separate page, if necessary.

* City Historic Preservation funding provides a **minimum of \$2,000** and a **maximum of \$30,000** per project *

<u>Description of Work Item and Contractor Name</u>	<u>Cost Estimate</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Architectural & Engineering Costs (Cannot exceed 20 percent of total eligible work item costs):

_____	_____
_____	_____
_____	_____

Total Cost for HP Eligible Work Items: \$

Non-profit organizations or projects with matching funds provided by an outside organization or other city assistance programs (30 percent match):

Total funding request for HP eligible exterior items: \$ X .7 = \$

- OR -

Individual grant recipients who **do not receive funding assistance** for the match amount from a non-profit organization or from another city assistance program (20 percent match):

Total funding request for HP eligible exterior items: \$ X .8 = \$

4. Funding Sources. Outline all other funding sources that are committed to complete the project other than funding requested from the Historic Preservation Office Low-Income Historic Housing Rehabilitation Program. Include the names of financial institution, government program, organization or individual providing other funding.

	<u>Source</u>	<u>Amount</u>	<u>Loan or Grant</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

Total amount from other sources: \$ _____

IV. INFORMATION ON PRIMARY LIENHOLDERS. The city's purchase of the Conservation Easement requires the consent of all significant lienholders. A title report will be obtained by the city to verify all information provided. Accuracy of this information is critical. ***Consent from the lienholder(s) must be received prior to disbursement of any funds.***

1. Primary mortgage company: _____
 Contact person: _____
 Correspondence address: _____

(Note: This is usually different than the payment address)

Company telephone number: _____
 Company fax number: _____
 Loan number: _____

2. Secondary mortgage company: _____
 Contact person: _____
 Correspondence address: _____

(Note: This is usually different than the payment address)

Company telephone number: _____
 Company fax number: _____
 Loan number: _____

C. Required Low-Income Qualification Paperwork

This is a list of the documents required to determine if your household is at or below 80 percent of the median household income for Maricopa County. Please do not send originals because we will not be responsible if they get lost nor will we be able to mail them back.

Please submit copies of the following documents with your application:

- Income** – Income verification for everyone in the household 16 years old and older who receive income from any source.
 - If employed, provide verification for the past three months of income issued by the employer. If a household member over 16 years of age **does not** have income or is unemployed, please have them provide a notarized statement that they have no income or are unemployed.
 - Please provide an award letter, check stub or other third party verification if receiving any of the following:
 - Social Security
 - Supplemental Security Income (SSI)
 - Retirement/pension/annuity
 - Unemployment income
 - Food stamps
 - Disability income
 - DES Cash Assistance
 - Alimony/child support
 - Veteran’s Administration
- Verification** – Of all additional household members’ occupancy in the household (ex. guardianship papers, tax returns, school records, pay stubs, photo ID with address, etc.)
- Taxes** – Last year’s complete federal taxes filed with the IRS (*include all pages and W-2 forms*), or the last three years of complete taxes if self-employed. If you have had earned income in the past two years but have **not** filed taxes, please submit a notarized statement attesting to that. If you are elderly or receiving disability, a notarized letter is **not** required if **you** did not file taxes.
- Bank statements** – Most recent checking and savings account statements for **all** household members’ current accounts.
- Mortgage information** – Most recent statement from Mortgage Company (monthly statement **or** bank statement showing the amount deducted). Or, check here if your mortgage is paid off.
- Utility bills** – Current utility bills (APS or SRP, Southwest Gas, city of Phoenix water bill). If the person listed on the utility bill does not currently reside at the property, documentation to that effect is needed (death certificate, divorce decree, lease agreement or utility bill in that person’s name at another address).

One original copy of the application with all the attachments should be mailed or delivered to the Historic Preservation Office at the following address. Incomplete submittals will be returned to the applicant and will not be reviewed.

**City of Phoenix
Historic Preservation Office**
200 W. Washington St., 17th Floor
Phoenix, AZ 85003

VII. SIGNATURES.

I declare that I have reviewed the Low-Income Historic Housing Rehabilitation Program Guide; I understand its contents and am submitting this application in accordance with that Guide. All information submitted is true to the best of my knowledge and belief. I acknowledge that any error may affect its review and approval. I understand that if I wish to change any aspect of the project after it has been approved, I must obtain the written consent of the city. I also understand I will be required to obtain a Consent Agreement from my lienholder(s), and sign and abide by the terms of the Deed of Conservation Easement and the Low-Income Historic Housing Rehabilitation Program Agreement.

Property Owner

Date

Executive Director (applicable if non-profit only)

Date

For more information or a copy of this publication in an alternate format, contact the Historic Preservation Office at 602-261-8699/voice / 602-534-5500/city TTY Relay.



City of Phoenix

