

**2008 HISTORIC ARCHITECTURAL REHABILITATION GRANT PROGRAM
PROCEDURES FOR
50/50, 75/25, AND EXTERIOR PAINT PROGRAM**

This packet contains information to assist in providing the necessary documentation to complete the application for the 2008 Historic Architectural Rehabilitation Grant(s).

Any questions should be directed to the Community Development Group at 847-931-5910.

- A. Eligible Properties
- B. Application Process
- C. Review of Applications
- D. Inspections
- E. Agreements
- F. Grant Project Work
- G. Payment of Grant Fund

A. ELIGIBLE PROPERTIES

Properties are eligible to apply for the Historic Architectural Rehabilitation Grant program if they meet the following qualifications:

1. The property must be a residential structure, 50 years or older, located within a historic district designated by City ordinance or a residential structure registered as an Elgin landmark by City ordinance. Residential properties within the following historic districts and landmarks are eligible to apply:

Elgin Historic Districts

- Elgin Historic District (Gifford Park)
- Spring-Douglas Historic District
- Elgin National Watch Historic District

Elgin City Landmarks (residential use)

- Properties designated by the Elgin City Council

2. The property must contain no more than four dwelling units. Properties where the proposed work will convert the use to a lawful, conforming status and be made compliant with all applicable codes will also be considered.
3. The property owner must be at least eighteen years of age.

Additional eligibility requirements for the 75/25 Program and Exterior Paint Program:

1. The property must be owner-occupied at the time of application.
2. The property owner's household must meet the current low and moderate income guidelines set by the United States Department of Housing and Urban Development. For household sizes between 1 and 8, the low to moderate income guidelines are as follows (current as of March 8, 2006):

| | | | | | | | | |
|-----------------|--------|--------|--------|--------|--------|--------|--------|--------|
| Household Size | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| Low Income | 26,400 | 30,150 | 33,950 | 37,700 | 40,700 | 43,750 | 46,750 | 49,750 |
| Moderate Income | 41,700 | 47,700 | 53,650 | 59,600 | 64,350 | 69,150 | 73,900 | 78,650 |

Note: In order to be eligible to participate in the 75/25 Grant Program, property owner household incomes must fall at least within the moderate income level for that particular household size.

B. APPLICATION PROCESS

Application submission deadline for 50/50 program - Applications will be scored and ranked according to the criteria for selection process, as set forth by the Elgin Heritage Commission. For a copy of the criteria and scoring system, please call the Department of Planning & Neighborhood Services at (847) 931-5910. **Deadline:** February 1, 2008

Application submission deadline for 75/25 and Exterior Paint Program - Applications will be received and scored upon a first come first serve basis beginning January 2, 2008. The program will end when the allotted \$100,000 has been committed or on October 1, 2008, after which the remaining funds will be transferred to the 50/50. **Deadline:** None.

ALL 50/50 GRANTS ARE CONSIDERED TAXABLE INCOME.

1. Fill out application form. FORM A 2008 (2 pages). It is recommended that potential applicants contact City Staff to schedule a pre-application meeting at the subject property. While this is not required, the meeting may help provide assistance and answer questions regarding the application form, supporting documentation and type of work proposed.

An additional form, FORM B 2008 (1 page) will need to be filled out by applicants for the **75/25 and Exterior Paint Program** to provide information on household income and owner occupied status.

2. Attach supporting documentation to application form including the following:

- Two detailed cost estimates provided by licensed contractors. If you plan to complete the project on your own, please submit a cost estimate for materials proposed to be used. (Note: Funding will be reimbursed only for material costs if you complete the project on your own.)
- Drawings with dimensions and specifications for projects involving extensive construction together with material and manufacturers specifications of items to be purchased. Drawings include a Plat of Survey, plans, elevations and construction details.
- Certificate of Appropriateness (COA) application completely filled out and signed.
- Photographs of the features and/or entire building on the property are optional. The Historic Preservation Coordinator is available to assist with photographs.

For the 75/25 and Exterior Paint Program, to substantiate that the owner occupies the property, any one of the following must be submitted:

- Property Warranty Deed
- Most recent Property Tax Form
- Land Contract registered with the County

For the 75/25 and Exterior Paint Program, to substantiate the income of the property owner, the most recent of any one of the following must be submitted:

- IRS Federal Income Tax Return (IRS Form 1040 or 1040A)
- Circuit Breaker Form (Property Tax Release)- for senior citizens only
- Social Security Statement- for senior citizens only
- Pension Check- for senior citizens only

C. REVIEW OF APPLICATIONS

On receipt of the application forms by the submission deadline, the property and proposed work will be evaluated by City staff and the Elgin Heritage Commission's Grant Review Subcommittee. Review will be carried out based on the following criteria for selection:

1. **Proposed work to structure-** the following categories are listed in order of funding priority.

- Complete reconstruction of missing features. (**Example:** Such as front/side porches, parade porches, towers, turrets and carriage houses based on original evidence and designs.)
- Removal of multiple non-original inappropriate features and restoring all with original details and materials on significant elevations. (**Example:** Removal of non-original aluminum/vinyl siding to restore the original underlying wood siding, while restoring any original window openings and ornamental features.)
- Removal of individual non-original inappropriate features and restoring to original detail and material. (**Example:** Enclosed porch or concrete stoop porch to original materials and level of detail, siding restoration- requires trim detailing, asphalt shingle to cedar or tile roof, installation of half round gutters and round down spouts, installation of wood storm windows and screens or correct period and style design wood storm door.)
- Repairing/stabilizing deteriorated existing features and reusing existing architectural elements. (**Example:** Porch overhaul utilizing new structural lumber and decking but conserving column/posts, spindles/balusters, and brackets, through epoxy consolidants or other methods. Window overhaul using epoxy consolidants or other methods.)
- Continuing maintenance. (**Example:** Cleaning, re-pointing, scraping, and painting, porch handrail repair, glazing and glass replacement while retaining original sashes.)
- Replacement. Replacing deteriorated materials with new appropriate materials different than the original. (**Example:** New wood windows, new door, new Architectural composition asphalt shingles.)

Note: The following projects are not eligible for funding under the grant program:

- Decks and fences
 - Landscape and plant material, sidewalks, driveways, retaining walls, and other site features.
 - **The use of substitute material in:**
 - Siding
 - Aluminum and vinyl extruded or clad windows; storm windows and doors
 - 3-tab shingle for roofs
 - Flush mounted, ogee, K-style gutters in aluminum or plastic
 - Metal panel doors
2. **Current historic/architectural significance of the structure-** The significance of a property will be scored using professional surveys undertaken in the historic districts. Properties are rated Significant, Contributing, or Non-Contributing. Additional points will be awarded to a structure for work that will elevate the status of that structure from Non-Contributing to Contributing status.
 3. **Evaluation of relative visual public benefit or impact to the street scape-** Issues such as visibility and location within the neighborhood, and anticipated change in appearance after completion of work will be considered.

For the 50/50 Program only:

Occupancy - Owner occupied homes score higher than rental properties.

For the 75/25 Program only:

Property owner income- Lower income applicants will score higher than moderate income applicants.

On completion of the review of applications, a list of eligible recipients ranked in order of points scored, will be transmitted to the Elgin City Council for final approval.

D. INSPECTIONS

One of the requirements of the grant program is that properties participating in the grant program be fully compliant on the exterior of the property with all applicable codes prior to final payment. To facilitate the awareness of any code violations on properties, inspections by the Department of Code Administration and Development Services will be carried out as outlined below.

1. Initial code inspection: After approval of selected grant projects by the City Council, property owners will be contacted to determine if they wish to proceed with the grant project. An initial code inspection of the exterior of each selected property will be carried out by an inspector of the Department of Code Administration and Development Services to determine existing code violations. This inspection will be carried out in addition to the evaluation of the proposed work and be conducted prior to undertaking the Grant Agreement.
2. The property owner will be notified of outstanding code violations on the property. The violations will generally need to be corrected within the time allocated by the Department of Code Administration and Development Services. If an extension is required, please contact the Code Enforcement Officer that conducted the inspection. Properties with major rehabilitations may be eligible to participate in the program if they enter into a Long Term Rehabilitation (LTR) Agreement with the City pursuant to Section 2.65.030 of the Elgin Municipal Code to allow for time in addition to that allocated for completion of the grant project.

The term for any LTR Agreement will be determined by the Department of Code Administration and Development Services or designee and will not exceed fifty-four months from the execution of the LTR Agreement.

3. After completion of the project, a follow-up code inspection will be carried out on the property prior to disbursing the funds to ensure that violations are corrected.

In the event the grant work is completed, but other code violations exist which were not identified during the first inspection, additional time will be provided. The time for compliance will be determined by the Department of Code Administration, or designee, not to exceed a maximum of 90 days.

Note: If a project is not completed in the stipulated amount of time or withdrawn by the applicant, all the code violations on the exterior of the property determined at the initial code inspection and/or any subsequent inspection will need to be corrected. The time limit allowed for compliance with the property maintenance codes will be determined by the Code Enforcement Officer.

E. AGREEMENTS

1. Grant Agreement: The selected participants of the grant program will need to undertake a Grant Agreement with the City of Elgin to complete the proposed grant project. Grant Agreements must be signed and returned within 30 days, or it will constitute a forfeiture of the grant awarded, and funds will be transferred to the next project on the waiting list.
2. Term of Grant Agreement: Property owners participating in the grant program have 18 months from the time of signing the agreement to complete the grant project.

F. GRANT PROJECT WORK

1. Beginning the project: Grant project work as reviewed by the Elgin Heritage Commission and approved by the City Council may commence after the Grant Agreement has been signed, a Certificate of Appropriateness (COA) and necessary Building Permits issued.
2. All grant project work carried out to the exterior of the structures on the property must conform to the Elgin Design Guideline Manual and be approved through a COA.
3. Upon receipt of the signed Grant Agreement, applicants will have 180 days to receive approval for a Certificate of Appropriateness and/or submit a change in scope request.

The modified project will then be reevaluated based upon the established criteria for selection. If the modified project still qualifies for funding under the budget cycle, the grant allocation will then be modified to reflect the modified scope of the project but would not exceed the original allocated amount.

If the modified grant project fails to qualify based upon the established criteria for selection, then the grant funds will be forfeited and the next selected recipient will be invited to participate in the program. **However, all outstanding code violations will need to be corrected in the time determined by the respective Code Enforcement Officer.**

Please note: If the proposed work requires approval from the Elgin Heritage Commission's Design Review Subcommittee, an application will be presented at the next available meeting. The Design Review Subcommittee meets the 2nd and 4th Monday of each month at 6:00 p.m. in the City Council Chambers.

4. Time period to complete grant project: Grant participants have 18 months to complete all the work as originally approved under the agreement. If the grant work has not been completed within the 18 month time period, the grant funds will be forfeited unless additional time, not to exceed 90 days, is granted by the Community Development Group Director or designee due to unreasonable or unforeseen circumstances.

Note: All outstanding code violations will need to be corrected in the time allotted for the completion of the project regardless of whether the project has been completed or withdrawn by the applicant.

5. Progress reports will be mailed out to grant recipients on a quarterly basis to track the progress of the project and to identify any potential timing problems before they arise.
6. Final evaluation of grant project: On completion of the grant project, an evaluation of the work will be carried out by the appropriate City Staff together with any additional code inspections.

G. PAYMENT OF GRANT FUNDS

1. Payment of grant funds will only be made once the grant project is completed within the stipulated 18 months and the property is made fully code compliant on the exterior of the property.

Payments will only be processed after submission of proper proof of payment to the contractors/vendors, together with statements of completion or waivers of lien. Payment will not exceed the original amount allocated at the time of approval of the project.

2. Retainage: In the event the participant has undertaken an LTR Agreement that exceeds the time limit of 18 months, the City will retain 25 percent of the allocated grant funds until the exterior of the property is brought into compliance with all applicable codes.
3. Partial payments will also be allowed during the course of the grant project if the work activities under the grant program relate to discrete and separate improvements to the property and the applicant's financial ability to participate in the program is dependent upon partial payments throughout the project.

The City will retain 25 percent of the allocated grant funds until the grant project is completed and the exterior of the property is brought into compliance with all applicable codes.

3. The applicant will be required to retain ownership of the property for a period of 12 months from the time of receiving the final payment of funds.

For more information on the Historic Architectural Rehabilitation Grant Program please contact:

Department of Planning & Neighborhood Services

Phone # 847-931-5910

City of Elgin, 150 Dexter Ct., Elgin, Illinois 60120

ELGIN HISTORIC ARCHITECTURAL REHABILITATION GRANT PROGRAM
50/50, 75/25, and Exterior Paint Programs - Year 2008
FORM A 2008

PART 1

Property Address: _____

Applicant Name: _____ SS #: _____ - _____ - _____

Mailing Address: _____

City: _____ State _____ Zip: _____ Daytime Telephone: (_____) _____

NOTE: If the applicant is not the owner, he/she must be authorized by the owner to commit to changes proposed on the property.

PART 2

Do you live on the property? ___yes ___no
Do you rent or own? ___rent ___own
Number of dwelling units on property. ___1 ___2 ___3 ___4
Number of street frontages. ___1 ___2 ___3
(If more than one, please name the Streets that the property fronts onto)

Street Names: _____

PART 3

Please describe the work you propose to undertake on the exterior of the property. This should include changes and alterations to the building(s), and must itemize all features to be removed and/or added. Indicate the type of material to be used when replacing features. (*Use additional pages if necessary.*)

PART 4

Are you applying for the 50/50 Program *75/25 Program *Exterior Paint Program
(Please check the relevant boxes) For additional information on the programs, consult the Program Procedures.

***If applying for the 75/25 or Exterior Paint program, please fill out FORM B and submit with completed FORM A.**

PART 5

Please provide a brief description of each item of work you are proposing. Next to the description for each item, list the estimated cost for completion provided by each of your two contractors. List the name of the contractor who provided each estimate beneath the cost. If you plan to complete an item of work on your own, please submit a cost estimate for materials to be used.

(Note: funding will be reimbursed only for material costs if you complete the project on your own.)

| Item # | Description of Work | Cost - Estimate # 1 (\$) Contractor Name | Cost - Estimate # 2 (\$) Contractor Name |
|--------|------------------------|--|--|
| 1. | | Cost: Name: | Cost: Name: |
| 2. | | Cost: Name: | Cost: Name: |
| 3. | | Cost: Name: | Cost: Name: |
| 4. | | Cost: Name: | Cost: Name: |
| 5. | | Cost: Name: | Cost: Name: |
| 6. | | Cost: Name: | Cost: Name: |
| 7. | | Cost: Name: | Cost: Name: |
| 8. | | Cost: Name: | Cost: Name: |
| 9. | | Cost: Name: | Cost: Name: |
| | Total Cost of Project* | \$ | |

*For Staff use only. Total cost will be determined by using the lowest reasonable bid for each item of work. This information will not affect your choice of contractor.

Note: Applications will not be considered unless a minimum of two contractors estimates (or one material estimate) are submitted for each item of work.

Applicant's Signature: _____ Date: _____

Owner's Signature: _____ Date: _____

75/25 PROGRAM AND EXTERIOR PAINT PROGRAM
To be submitted along with regular grant program application
Form B 2008

Property Address: _____

Name of Head of Household: _____

Social Security Number: _____

| PART 1 | | | | Household Income Information (Previous Year) | | | |
|--|------------|------------|------------------------------|---|--|--|--|
| Name | Age | Sex | Adjusted Gross Income | | | | |
| a: (Head of Household) | | | \$ | | | | |
| b: | | | \$ | | | | |
| c: | | | \$ | | | | |
| d: | | | \$ | | | | |
| e: | | | \$ | | | | |
| f: | | | \$ | | | | |
| g: | | | \$ | | | | |
| h: | | | \$ | | | | |
| Total Previous Year Household Income (total of lines a thru h) | | | \$ | | | | |
| Figure reported in IRS Form 1040 or 1040A (Only list Adjusted Gross Income) | | | \$ | | | | |
| If filed separately, list both figures (Only list Adjusted Gross Income) | | | \$ | | | | |

Note: To substantiate the above information, please submit the most recent copies of any one of the following:

- IRS Federal Income Tax Return (IRS Form 1040 or 1040A)
- Circuit Breaker from (Property Tax Release) (For senior citizens only)
- Social Security Statement (For senior citizens only)
- Pension Check (For senior citizens only)

PART 2

Do you live on the property? yes no

Note: Only owner-occupied residential properties up to 4 units are eligible for participation in the program.

To substantiate the above information, please submit copies of any one of the following:

- Property Warranty deed
- Most recent Property tax form
- Land Contract registered with the County