

## APPLICATION CHECKLIST

Applications for the Exterior Rehabilitation/Conservation Easement Purchase Program **must** be received (Postmarks NOT ACCEPTED) by **5 p.m.** at the Historic Preservation Main Office, 200 W. Washington St., 17th Floor, by: **March 3, 2010.**

Please make sure that your submittal is complete. Incomplete applications will not be reviewed and will be returned to the applicant.

The following materials **MUST** be submitted with the completed application form:

- \_\_\_\_\_ **One original and seven (7) copies—a total of eight (8) copies** of the complete application submittal (including the estimates, photos, site plan, etc.). Incomplete submittals (including not providing the required number of copies) will be returned to the applicant and will not be reviewed.
- \_\_\_\_\_ **TWO** independent cost estimates or price quotes from qualified contractors having experience for each item in the Scope of Work.
- \_\_\_\_\_ Photographs of property (35 mm or digital) showing all major work items (original application must contain at least one original set of photographs). **Each photo must be at least 4"x6" in size.** Printouts from a digital camera on a color inkjet or color laser printer are acceptable. Black and white photocopies of original color photographs are **not** acceptable, except for copies of historic photographs being used to assist in the reconstruction of a missing feature. **Seven copies of original application:** Color photocopies of the original set of photographs are acceptable.
- \_\_\_\_\_ Site plan indicating where the work is to take place (window work, stucco repair, etc.) and other architectural drawings necessary to describe the project.

**Have you reviewed the required legal documents?**

- \_\_\_\_\_ Exterior Rehabilitation Program Agreement
- \_\_\_\_\_ Deed of Conservation Easement

**If approved**, you must list the city of Phoenix as a "loss payee" on your homeowner's insurance policy. Contact your insurance agent regarding this requirement. This normally is a no cost item to the insured. A copy of your policy endorsement will be required prior to disbursement of any funds.

**(OVER)**

## SUMMARY OF EXTERIOR REHABILITATION PROGRAM PROCEDURES

### Project Approval Sequence:

1. Historic Preservation Office (HPO) staff is available to meet with applicants to discuss the proposed Scope of Work before applications are submitted for review. *Applicants that meet with HPO staff before Friday February 5, 2010 will receive an extra point in the scoring process.*
2. HPO staff contacts the property owner to schedule a site inspection of the property after the complete application is submitted. At the inspection HPO staff evaluates the property condition and the proposed work items to ensure that critical needs are being addressed and that the proposed work meets the city's *Preservation Philosophy* and Exterior Rehabilitation Program goals.
3. Funding through this program is competitive and ranked by a review panel. A new review panel is selected each application round and consists of members of the Phoenix Historic Preservation Commission, HPO staff, an historic district resident, a previous participant in the Exterior Rehabilitation Program and a preservation professional (such as an architect, engineer, contractor, archeologist or historian). All members of the review panel must have expertise or an interest in historic preservation.
4. Projects are then submitted to the Historic Preservation Commission and City Council for approval before the Exterior Rehabilitation Agreements can be signed.
5. Once projects are approved, the HPO will obtain a title report and send the Consent Agreement to the Deed of Conservation Easement to your lender. **No grant funded work can commence and no funds can be disbursed unless the city receives lender consent.** It is the applicant's responsibility to ensure that the lender responds to the Consent Agreement and will agree to sign. Any fees or other requirements requested by the lender are the applicant's responsibility.
6. **The Exterior Rehabilitation Program Agreement and the Conservation Easement must be signed by the applicant BEFORE WORK CAN COMMENCE.** Applicants complete a Certificate of No Effect or Appropriateness from the HPO for all work items in the scope of work at the time agreements are signed.
7. Applicant (or contractor) obtains any building permits needed. Any building permit items may be subject to inspection by the Building Safety Division of the Development Services Department. Permit fees cannot be reimbursed and are the responsibility of the applicant.
8. Work must commence within 90 days of signing the Exterior Rehabilitation Program Agreements and be completed within one year from the date that the Exterior Rehabilitation Program Agreement is signed.
9. HPO staff will inspect projects when major work items are completed. Applicant can submit a completed payment request form and invoices and call or e-mail HPO staff to request inspection. All completed work must be inspected by the HPO before any invoices are approved for payment. If work is satisfactory, the HPO will process payment. **Payments are made to the Property Owner only. PLEASE ALLOW AT LEAST THREE (3) WEEKS to receive payment.** If a contractor requires payment at the time of completion, it is the applicant's responsibility to make acceptable payment arrangements. Applicants are encouraged to receive final HPO approval for work before remitting full payment to the contractor.
10. A final inspection will be made at completion of the project. Property should be accessible for HPO staff to take required photographs of completed work. Please have construction debris and overgrown vegetation removed prior to inspection.