

Ohio

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OHIO HISTORICAL SOCIETY
Ohio Historic Preservation Office



Ohio Historic Preservation Tax Credit Program



Round 4 Application



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Round 4 Timeline

Ohio Historic Preservation Tax Credit Program Round 4 Timeline						
JAN, 2010						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						
FEB, 2010						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						
MARCH, 2010						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	*31			
April., 2010						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	
MAY, 2010						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					
JUNE, 2010						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			
Important Deadlines						
January 1st -Round 4 Application Period Begins						
March 31st- Round 4 Application Submission Deadline						
April 1st- Application Review Period Begins						
May 31st- Application Review Period Ends						
June 30th - Last Date Approved Applicants must be Announced						



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General Application Instructions and Style Guide

This worksheet will provide guidance on what information and documentation are required for an application to the Ohio Historic Preservation Tax Credit program. Please read all instructions carefully before compiling your application and contact the Urban Development Division at historic@development.ohio.gov or 614-995-2292 if you have any questions about the application.

- Any applications received after the last day of submission window will be included in the following application period.
- The Ohio Historic Preservation Tax Credit Application material is available on-line at <http://development.ohio.gov/UD/OHPTC/>. Complete forms as MS Word or MS Excel documents and print out for submission with **original signature by the owner**, along with the attachments required in each section. (Refer *Attachment Checklist* in Appendix on page 30-31)
- On all applications, only original signatures of the owner will be accepted, no copies shall be considered.
- **You must provide the following:**
 - Two completed original applications in hard copy form;
 - Two electronic versions of the application on two separate compact disks.
- You may submit* forms via U.S mail, delivery service, or in person to:
Ohio Department of Development, Urban Development Division
77 S. High Street, 26th Floor Columbus, Ohio, 43215

*The Urban Development Division is open between 8.00 am and 5.00 pm, weekdays only.

For the electronic application submission:

- Submissions should create a folder structure modeling the table of contents of this worksheet and place all information and documentation in appropriate folders.
- Each document name should begin with the name of the project followed by the section of the application in which it is found (XXXX Building: Part A1 – Project Information Summary)
- Attachments can be any common Microsoft, Adobe or other common application types.

For the original application submission:

- Applications must be submitted in 3-ring binders only. Multiple binders are acceptable. Do not overload the binders.
- If drawings are required, they must be submitted separately in hard copy form. Do not put the drawings in binders.
- Each section of the application must be tabbed to delineate individual attachments and separated into Sections A, B and C of the application.
- All pages must be numbered (i.e., A-1, A-2, B-1). Each section of the application must be independently numbered in the bottom center of the page. (Hand numbering will be accepted)

PART A – Basic Project Information

1. Owner Declaration Form

Please provide this as **Attachment 1**

I hereby attest that the information I have provided is, to the best of my knowledge, correct. I understand that falsification of representations in this application may subject the applicant to criminal sanctions including fines and/or imprisonment pursuant to ORC 2921.77 and make the applicant ineligible for future state assistance pursuant to ORC 9.66.

Owner of Authorized Representative’s Signature:

(Original Signature Only)

Date: _____

Print Name Owner or Authorized Representative:

Address/City/State/Zip Code:

Daytime Phone Number:

Email:

Fax Number:



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2. Project Information Summary

Complete the below form and provide as Attachment A2.

PROJECT NAME:			
STATUS: (COMPLETED BY STATE)		APPLICATION NUMBER: (COMPLETED BY STATE)	
OWNER INFORMATION		PROJECT INFORMATION	
Project Owner:		Address:	
Tax Class: (LLC, S-Corp, C-Corp, Partnership, Individual, or Other)		County:	
Representative Name:		Economic Development District:	
Representative Title:		Parcel ID(s):	
Company:		Census Tract(s):	
Address:		Site Acreage:	
Phone :		Vacancy Rate (%) of project:	
Email:		Proposed Start Date:	
		Proposed End Date:	
PROJECT CONTACT INFORMATION		FINANCIAL INFORMATION	
Contact Name:		Total Project Investment: \$	
Contact Title:		Remaining Investment to Complete Project: \$	
Company:		*Estimated Qualified Rehabilitation Expenditures: \$	
Address:		Estimated State Tax Credit Requested: \$	
Phone :		Most Recent Project Tax Valuation: \$	
Email:		Permanent Jobs Created:	
		Construction Jobs Created:	
Fill End Use Breakdown Below			
Residential %:	Commercial %:	Institutional %:	Retail %:

* In accordance with ORC 149.311 (B) (2), the director shall ensure that approved applications include a mix of both high and low qualified rehabilitation expenditures. To fulfill this requirement, the director will use the average of the prior five calendar years rehabilitation costs of all federal historic preservation tax credit investment projects certified in the state of Ohio. Low qualified rehabilitation expenditure applications have rehabilitation costs below the five year average whereas high qualified rehabilitation expenditure applications have rehabilitation costs equal to or greater than the five year average. **The current average of all certified projects is \$1,260,243 for calendar years 2004-2008.**



3. Description and Scope of the Project

Provide a brief summary of the project describing its economic and historic importance to the State of Ohio and the community and/or neighborhood in which the building is located. Also provide information about the overall scope of the project including what parts of the building will be rehabilitated, what parts of the building will not be rehabilitated, what additions or new construction is included in the application and any other information necessary to understand the overall scope of the project. Provide this as **Attachment A3**.

4. Proof of Ownership

Eligibility Criteria	Definition	Information Required
Proof of Ownership	The applicant is the fee simple owner of the building and is not a governmental entity as in section 149.311 of the Ohio Revised Code.	Provide as <u>Attachment A4</u> 1. Deed for project or County Auditor's card for all the parcels. 2. Executed sale and purchase agreement for all parcels. 3. Executed closing documents for all parcels (settlement sheets).

4.1 Is the applicant a fee simple owner of the building?

Check (x) one that applies:

YES	
NO	

4.2 Owner Tax Classification

Check (x) one that applies:

Individual	
C-Corp	
S-Corp	
Partnership	
L.L.C	
Other	



5. Major Factor Criteria

Eligibility Criteria	Definition	Information Required
Major Factor	The issuance of the tax credit is a major factor in the applicant’s decision to rehabilitate the historic building or to increase the level of investment in the rehabilitation of the historic building.	Provide as Attachment A5 Attach explanation supporting declaration of major factor.

5.1 The Ohio Historic Tax Credit is a major factor in the decision to: (Check (x) one that applies)

Rehabilitate the building	
Increase the level of investment in the rehabilitation	

6. Rationale for Staged Project

Criteria	Definition	Information Required
Rationale For ‘Staged’ Project	Project is ‘staged’ project if it is scheduled to be completed in duration of 60 months. A ‘non-staged’ project is scheduled to be completed in duration of 24 months.	Provide as Attachment A6 Reasoning for distributing the rehabilitation work over a period of 60 months along with the breakup of the work to be completed in each stage. No documentation required for a Non-Staged project.

6.1 Rehabilitation Period (Check (x) one that applies)

24 Month(Non-Staged Period)	
60 Month (Staged Project)	



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PART B – Historic Project Information

IMPORTANT NOTE: Check Whichever Applies.

If submitting a Combined Federal and State tax credit project referencing a federal Historic Preservation Certification Application for the building, provide the date the federal application was submitted to the Ohio Historic Preservation Office (Part 1, if applicable, and Part 2). Provide the Ohio Historic Preservation Office Part 2 recommendation date (from owner or project contact's copy of the "State Historic Preservation Office Review and Recommendation Sheet Part 2/Part 3) and the National Park Service Project Number, if available.

It is highly encouraged that the Federal Part 2 application is submitted to the Ohio Historic Preservation Office well ahead of the application submission deadline.

Please note the Ohio Historic Preservation Tax Credit application does not take the place of any federal Historic Preservation Certification Application requirements for Combined State and Federal tax credit applications.

Combined Federal and State tax credit project applicants need to provide only the information requested above and complete question 1 (Historic Building Designation Status) for this section (Part B) of the application.

Provide Federal Part 1 information as **Attachment B1.2**

Provide Federal Part 2 information as **Attachment B1.3**

State only applicants will need to complete this section (Part B) of the application in its entirety.



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1. Historic Building Designation Status

Please check only one of the below categories and provide the appropriate information required.

Status	Information Required	Check one (X)
a) Individually Listed Building that is <i>individually listed</i> in the National Register of Historic Places.	Provide as <u>Attachment B1</u>	
b) Local Landmark Building is an individual local landmark designated by a Certified Local Government.	Provide as <u>Attachment B1</u> Documentation of local designation, such as copy of local designation status legislation or a letter verifying local designation from the certified Local Government Contact Person http://www.ohiohistory.org/resource/histpres/toolbox/clgcontacts.html)	
c) In Registered Historic District If the Building is within a registered historic district, check the type of district:	Provide as <u>Attachment B1 as applies</u>	
(i) National Register Historic District	Name of the Historic District _____	
(ii) National Park Service certified local historic district	Name of the Historic District _____	
(iii) Historic district designated by Certified Local Government	Provide documentation of local legislation and documentation that the building contributes to the district, such as a copy of the local designation or a letter verifying local designation from the Certified Government Contact Person	

2. Description of Physical Appearance

Definition	Information Required
<p>Description of the building should contain and is not limited to:</p> <ul style="list-style-type: none"> • Information about the major features of the building on both the exterior and interior. • Description of building in its present condition (before Rehabilitation), not as it was built or as it will be after rehabilitation. • Note the architectural style, exterior construction materials, (wood, brick, etc.), and distinguishing architectural features (placement and type of windows, chimneys, porches, decorative interior features or spaces.) • Describe any changes made to the building since its original construction; for example, additions, porch enclosures, and new storefronts, relocation of doors and windows, and alteration to the interiors. • Other buildings on site, such as carriage houses, barns and sheds should also be fully described. • Discussion on how the building relates to others in its neighborhood, or district if appropriate, in terms of its scale, building materials, style and period of construction. 	<p>Provide as <u>Attachment B2</u></p> <p>Provide a typed narrative that details the exterior and interior appearance and the condition of the building.</p>

3. Statement of Significance

Definition	Information Required
<p>Statement of Significance should be a summary of the following:</p> <ul style="list-style-type: none"> • Significance of the building, outlining its historic, architectural, and/or cultural significance as appropriate. • For a building within a registered historic district, a summary of how the building contributes to the significance of the district. This should relate to the significance of the district including the district's period of significance as identified in the district documentation. • Important figures from the past associated with the building, former uses, and the name of the architect or builder, if known. 	<p>Provide as <u>Attachment B3</u></p> <p>Provide a typed summary description.</p>



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5. Data on Building and Rehabilitation Project

Fill in the white spaces below and provide as this data form as **Attachment B5**

REHABILITATION DATA			
Application Type: (staged/non-staged):		Designation Status:	
Date(s) of Original Building Construction		Source of Date(s) for Original Construction	
Date(s) of Alterations		Source of Date(s) for Alterations	
Has the building been moved?		If so, when was the building moved?	
Floor area before rehabilitation (sq ft)		Floor area after rehabilitation (sq ft)	
Use(s) before rehabilitation		Use(s) after rehabilitation	
Housing Units (pre-rehabilitation)		Housing Units (post-rehabilitation)	
Housing Units for Low- Moderate income (pre-rehabilitation)		Housing Units for Low- Moderate income (post-rehabilitation)	
Type of Construction (Masonry, bearing wall, wood frame, steel frame etc.)			
Information Required			

6. Detailed Description of Rehabilitation/Preservation Work

Definition	Information Required
<p>This requires the description of the entire project in the rehabilitation narrative worksheets provided. Use a separate narrative worksheet for each architectural feature, including but not limited to such items as site work, roof, masonry walls, windows, lobby, floors, stairways, HVAC, offices, apartments, anything that has architectural or historical significance, anything being added to the building.</p> <ul style="list-style-type: none"> • The following must be described: <ul style="list-style-type: none"> ○ Identify the architectural feature requiring work and indicate whether the feature described is original to the building, was added at a later date, or is proposed new construction. ○ Give approximate date of the feature. ○ Physical condition- Describe existing state of the feature indicating drawing numbers that show the feature described. ○ Rehabilitation Work-Explain in detail the rehabilitation work to be undertaken. ○ Describe the effect (visual, structural, or other) on existing features. ○ List drawings, photographs, or specification page numbers that show the rehabilitation work and impact on existing building. • Drawings or Sketches are required to show planned alterations or new construction. <ul style="list-style-type: none"> ○ Must be sufficiently detailed to show existing wall configurations and anticipated changes. ○ Must include floor plans, and when necessary sections and elevations. <p>Must be numbered and keyed to the rehabilitation narrative worksheets.</p>	<p>Provide as <u>Attachment B6</u></p> <p>Use as many rehabilitation worksheets as needed to complete the required information.</p> <p>Required drawings numbered and keyed to the application.</p>



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a. Rehabilitation Narrative Worksheet and Drawings

Instructions – Please copy and complete as many of the below sheets as needed to describe the rehabilitation work. Label each architectural feature described numerically for identification purposes. Please provide this as **Attachment B6**.

Number		Architectural feature	
Approximate Date of the feature			
Description of existing feature and its condition(attach additional pages if required)			
Description of work and impact on existing feature (attach additional pages if required)			
Photo No.		Drawing No.	



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PART C - Scoring Criteria

Instructions: The scoring criteria worksheets are for the aid of the applicants to walk through each criterion used to evaluate applications. The self scores for each of the below are to be populated in the *Summary Self-Score Spreadsheet* provided as an attached excel document.

1. Regional Distributive Balance

Information regarding the regional distributive balance questions for the Ohio Historic Preservation Tax Credit Program can be found in Appendices 1-3.

New to Round 4, **the top scoring applicant from each jurisdiction (municipalities or townships) will receive the maximum 20 points for the regional distributive balance portion of the competitive scoring criteria.** Applicants should complete this section of scoring using the values from appendix 1-3. Upon final scoring review, the Urban Development division will adjust the scores of the top scoring applications from each jurisdiction to the maximum regional balance points.

Measure	Definition	Information Required
1. Economic Development Region balance	Weighted preference for applications in economic development regions where tax credits were not approved in previous rounds.	The information regarding previously approved projects is available in Appendix 1.

1 Project	6
2-3 Projects	5
4-5 Projects	4
5-10 Projects	3
Over 10 projects	2

Your Score:

Maximum Score = 6



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Measure	Definition	Information Required
2. Jurisdictional Balance	Weighted preference for applications in jurisdictions (municipalities or townships) where tax credits were not approved in previous rounds.	The information regarding previously approved projects is available in Appendix 2.

0 existing projects in your jurisdiction	7
1-5 existing projects in your jurisdiction	6
5-10 existing projects in your jurisdiction	4
Over 10 projects your jurisdiction	2

Your Score:

Maximum Score = 7

Measure	Definition	Information Required
3. County Per Capita Balance	Weighted preference for applications in counties with lower per capita tax credit awards in previous rounds. <i>(Total Tax Credit for Projects in County / Total County Population (U.S. Census 2000) = Tax Credit per Capita)</i>	The information regarding previously approved projects is available in Appendix 3.

\$ 0-10	7
\$11-20	6
\$20-40	4
Over \$40	2

Your Score:

Maximum Score = 7



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2. Potential Economic Impact

a. Financing and Speed of Development

Measure	Definition	Information Required
4. Leveraged Investment	Weighted preference for applicants who leverage additional project investment. <i>(Total Project Investment / Estimated State Tax Credit Amount = Leveraged Investment Ratio)</i>	Provide this as <u>Attachment C1</u> Include a copy of the project budget See detailed description below.

Over 10.0	15
9.1 to 10.0	13
8.1 to 9.0	11
7.1 to 8.0	9
6.1 to 7.0	7
5.1 to 6.0	5
4.1 to 5.0	3
4.0	1

Your Score:

Maximum Score = 15

Leveraged Investment Guidelines:

The total project budget should include a detailed listing of all costs including:

- acquisition costs, construction costs, furniture, fixtures, and equipment, construction interest, architect and engineer, taxes and insurance, legal and professional fees, financing fees, project overhead, developer fees, marketing and advertising, and any other major expenditure involved in the rehabilitation of the historic building.

In addition to a project budget, the below financial information must be provided and will be used to evaluate the leveraged investment ratio and financing secured.

- *Total Project Investment* – Every cost associated with the project from the beginning of the current owner’s involvement. This figure includes acquisition costs, holding costs,



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marketing, parking lots or structures, new construction, additions, landscaping, furniture, site work, and other investments related to the project.

- *Remaining Investment to Complete Project* – All costs necessary to complete the full project scope listed in this application. This number represents the total amount needed to fully finance the project.
- *Qualified Rehabilitation Expenditures* – Ohio Revised Code 149.311 defines QRE as:
“Qualified rehabilitation expenditures” means expenditures paid or incurred during the rehabilitation period, and before and after that period as determined under 26 U.S.C. 47, by an owner of a historic building to rehabilitate the building. “Qualified rehabilitation expenditures” includes architectural or engineering fees paid or incurred in connection with the rehabilitation, and expenses incurred in the preparation of nomination forms for listing on the National Register of Historic Places. “Qualified rehabilitation expenditures” does not include any of the following:
 - (a) The cost of acquiring, expanding, or enlarging a historic building;
 - (b) Expenditures attributable to work done to facilities related to the building, such as parking lots, sidewalks, and landscaping;
 - (c) New building construction costs.
- *State Tax Credit Amount Requested:* Ohio Revised Codes 5725.151, 5733.47, and 5747.76 state “ The credit shall equal twenty-five per cent of the dollar amount indicated on the certificate, but the amount of the credit allowed for any dealer for any year shall not exceed five million dollars.” ORC 149.311 also states “A rehabilitation tax credit certificate shall not be issued before rehabilitation of a historic building is completed or for an amount greater than the estimated amount furnished by the applicant on the application for such certificate and approved by the director.”

Completing the above financial categories in the State Historic Preservation Tax Credit application represents a commitment by the applicant to make the investments identified should the application be approved and should align with the project description and scope of the project.



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Measure	Definition	Information Required
<p>5. Financing Secured</p>	<p>Applicant has financing and/or equity in place and is ready to begin development immediately.</p>	<p>Provide this as <u>Attachment C2</u></p> <p>See guidance for specific sources of financing secured below.</p>

100% of financing in place	15
90% of financing in place	13
80% of financing in place	11
70% of financing in place	9
60% of financing in place	7
50% of financing in place	5
40% of financing in place	3

Your Score:

Maximum Score = 15



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Financing Secured Guidelines:

- Federal Historic Preservation Tax Credits – For combined federal and state historic preservation tax credit applications, the submitted qualified rehabilitation expenditures (QRE) listed in application will be multiplied by 20% to determine the financing in place from the federal historic preservation tax credit for the project.
 - Example: \$1 million in QRE x 20% = \$200,000 of financing in place
- State Historic Preservation Tax Credits – For all applicants the submitted QRE listed in the application will be multiplied by 25% to determine the financing in place from the state historic preservation tax credit for the project.
 - Example: \$1 million in QRE x 25% = \$250,000 of financing in place
- Private Financing – Demonstration of private financing in place can be demonstrated through any or all of the following documents:
 - *Term Sheet*: This document is signed by a bank, financial institution or other investment source declaring their total financial investment in the project, date in which the investment will be made, the term of investment, and any conditions upon closing.
 - *Executed Loan Agreement*: This is a legal document demonstrating a commitment to loan a specific amount of financing for the project, date the commitment was made and established period of time in which the investment will take place.
 - *Commitment letter*: This document is signed by a bank, financial institution or other investment source declaring their total financial investment in the project, date the commitment was made and established period of time in which the investment will take place.
- Developer Equity - Demonstration of developer equity in place requires at minimum a signed letter of commitment from the developer and information from a bank, financial institution or third party accountant that clearly demonstrates the committed developer equity is unencumbered and available for this project.
- Deferred Developer Fees – A signed letter of commitment from the developer indicating the amount of deferred developer fees, date in which the fees will be deferred and recaptured. This total should align with the reasonable standard established in the federal historic tax credit program and be attainable through the continued cash flow of the project upon completion.



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Measure	Definition	Information Required
6. Timeliness to Completion	Weighted preference for a non-staged application over a staged application.	Provide this as <u>Attachment C3</u> The project completion schedule for the non-staged application (24-months) or a staged application (60-months).

Non Staged	5
Staged	1
Not Declared	0

Your Score:

Maximum Score = 5



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b. Quality of Project

Measure	Definition	Information Required
7. Physical Scope and Construction Jobs	Weighted preference for larger projects to maximize economic stimulus effect on a community by creating more immediate construction jobs and providing a larger area of physical improvement.	Provide this as <u>Attachment C4</u> Include a copy of the architectural drawings, site plan, or auditor’s webpage indicating the square feet of space proposed for the project. Physical scope may include rehabilitated spaces, additions and new construction that are part of the project scope identified in the application.

Over 100,000 s.f.	10
75,000-99,999 s.f.	8
50,000-75,000 s.f.	6
25,000-50,000 s.f.	4
10,000-24,000 s.f.	2
Under 10,000 s.f.	1

Your Score:

Maximum Score = 10



Measure	Definition	Information Required
<p align="center">8. End Use and Job Density</p>	<p>Weighted preference for end uses which generally maximize economic impact and job density. Each type of use is given a multiplier and the percentage of the building that is dedicated for that use will be multiplied and added together for a final use value. (See End Use Calculation tab to determine project value)</p> <p>* Multipliers: Commercial - 4, Retail/Hotel - 3, Institutional - 2, Residential - 1</p>	<p>Provide this as <u>Attachment C5</u></p> <p>Include a copy of the <i>Business Plan</i> or description of the project indicating the intended use after rehabilitation.</p>

4-3.61	10
3.6-3.21	8
3.2-2.81	6
2.8-2.41	4
2.4-2.0	2
Less than 2	1

Your Score:

Maximum Score = 10



Measure	Definition	Information Required
9. Vacant Project	The project is <u>not</u> currently occupied or used.	Provide this as <u>Attachment C6</u> Project vacancy rate (square footage not being occupied or used) at time of the application.

100% Vacant	10
85-99% Vacant	8
70-84% Vacant	6
55-69% Vacant	4
40-54% Vacant	2
Less than 40% Vacant	1

Your Score:

Maximum Score =

10



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c. Quality of Place

Measure	Definition	Information Required
10. Letter of Support	Local jurisdiction (municipality or township) supports the application	Provide this as <u>Attachment C7</u> A letter, ordinance or other formal method of support from the local jurisdiction is included. This may come from local elected officials, economic development or planning administrators.

Letter of Support Included in Application	2
No letter of support include in application	0

Your Score:

Maximum Score = 2



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Measure	Definition	Information Required
11. Strategic Plan in Place	Applicant's project is included in an adopted strategic plan for redevelopment in the area.	<p>Provide this as <u>Attachment C8</u></p> <p>Acceptable documents could include comprehensive plans, neighborhood or area specific plans, market studies or balanced growth initiative plans.</p> <p>Evidence of formal adoption by the local jurisdiction within the last 10 years is required to meet this criteria.</p>

Adopted strategic plan for development in place.	3
No strategic plan for development has been adopted.	0

Your Score:

Maximum Score = 3



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Measure	Definition	Information Required	
12. Benefit to Low Income	Weighted preference for projects that may serve as an economic stimulus in distressed areas. This measure uses the US Census tract(s) that the project is located in to calculate the poverty level of the application.	Provide this as <u>Attachment C9</u>	
		Census Tract Information regarding the poverty level of project can be found at http://factfinder.census.gov/servlet/SAFFPopulation?_s_ubmenuId=population_0&_sse=on	
		Instructions: In the upper hand corner of the screen you will see a search box. Beneath the search box is a link called "Search by Address". Click this link and then type in the address of the PROJECT in the boxes provided and click "GO". This will bring up a new page. To the left of the search box you will now see a link for a particular census tract number. Click that link and the new page will show you the census tract poverty level.	
		60% or greater poverty level	5
		40 - 59.99% poverty level	4
15-39.99%% poverty level	2		
Less than 15% poverty level	0		

Your Score:

Maximum Score = 5



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Measure	Definition	Information Required
<p align="center">13. Economic Development Innovation Zone or O.H.I.O Hub</p>	<p>Project is located within a one mile radius of an existing University System of Ohio institution or private four year university, public hospital or non-profit research institution not owned by a university or hospital or project property is within a designated Ohio Hub of Innovation and Opportunity (OHIO Hub) with an identified anchor institution providing a letter of support for the project.</p>	<p>Include as <u>Attachment C10</u></p> <p>Map to scale showing the project within a one-mile radius of an eligible entity.</p>

Yes	5
No	0

Your Score:

Maximum Score = 5

Appendix 1: Regional Distributional Balance Score

This section is provided as a reference for PART C, Question 1. The economic regions are indicated in the Map below and the score for each region is provided in Table 1.

Ohio Department of Development
Economic Development Regions



Prepared by: Ohio Department of Development,
Office of Strategic Research (July 2007)

Table 1: Regional Distributional balance		
Economic Region	Number of Approved Applications	Economic Development Region Score
1	6	3
2	5	4
3	1	6
4	6	3
5	43	2
6	1	6
7	4	4
8	37	2
9	8	3
10	2	5
11	1	6
12	4	4

Appendix 2: Jurisdictional Balance Score

Table 2 below has been provided as reference for scoring PART C, question 2. The applicants can determine their score by looking up their jurisdiction in the list provided below. If there are no existing OHPTC projects in your jurisdiction, the application will receive the maximum number of points (7).

Table 2: Jurisdictional Balance		
Jurisdiction	Approved Applications	Jurisdictional Balance Score
Akron	6	4
Cambridge	1	6
Canton	2	6
Chillicothe	1	6
Cincinnati	39	2
Cleveland	35	2
Columbus	6	4
Dayton	3	6
Hamilton	3	6
Ironton	1	6
Lebanon	1	6
Lima	1	6
Marietta	1	6
Marion	1	6
Oberlin	1	6
Piqua	1	6
Port Clinton	1	6
Portsmouth	1	6
Russell Township	1	6
Sandusky	1	6
Scott Township	1	6
Springfield	1	6
St. Clairsville	1	6
Toledo	3	6
Urbana	1	6
Youngstown	4	6

Appendix 3: County per Capita Balance Score

Table 3 below has been provided as reference for scoring PART C, question 3. The applicants can determine their score by looking up their County in the list provided below. If there are no existing OHPTC projects in your county, the application will receive the maximum number of points (7).

Table 3. County Per Capita balance				
County	Total Tax Credits	Total County Population (U.S Census 2000)	Tax Credit Per Capita	Score
Adams County	\$51,975	27,330	\$1.90	7
Allen County	\$2,625,000	108,473	\$24.20	3
Belmont County	\$750,000	70,226	\$10.68	5
Butler County	\$1,465,450	332,807	\$4.40	7
Champaign County	\$794,250	38,890	\$20.42	3
Clark County	\$2,980,430	144,742	\$20.59	3
Cuyahoga County	\$95,862,085	1,393,978	\$66.90	1
Erie County	\$1,750,000	79,551	\$22.00	3
Franklin County	\$14,158,907	1,068,978	\$8.79	7
Hamilton County	\$16,878,253	845,303	\$19.97	5
Lorain County	\$2,125,000	284,664	\$7.46	7
Lucas County	\$6,216,030	455,054	\$13.66	5
Mahoning County	\$5,722,314	257,555	\$22.22	3
Marion County	\$650,000	66,213	\$9.82	7
Miami County	\$3,675,563	98,868	\$37.18	3
Montgomery County	\$2,961,991	559,062	\$5.30	7
Ottawa County	\$625,000	40,985	\$15.25	5
Ross County	\$750,212	73,345	\$10.23	5
Seneca County	\$2,000,000	58,683	\$34.08	3
Stark County	\$38,412,652	378,098	\$101.59	1
Summit County	\$6,115,369	542,899	\$11.26	5
Warren County	\$439,250	158,383	\$2.77	7
Washington County	\$2,315,614	63,251	\$36.61	3
All other Counties	\$0	NA	NA	7

Appendix 4- State only Application Checklist

Note: Applicants can refer to the below checklists (whichever applies) to check the completion of all attachment requirements in the application.

ODOD /OHPO		Checklist Components		
Submitted	Not Submitted	State Only Applications		
Part A: Basic Project Information				
		Attachments	A1	Ownership Declaration Form
			A2	Project Information Summary
			A3	Project Description and Scope of Work
			A4	Proof of Ownership
			A5	Major Factor
			A6	Rationale for 'Staged' Project
Part B: Historic Application Information				
		Attachments	B1	Historic Building Designation Status
			B2	Description of Physical Appearance
			B3	Statement of Significance
			B4	Photographs and Maps
			B5	Data on Building and Rehabilitation Project
			B6	Rehabilitation Narrative Worksheets and Drawings
Part C: Self-Scoring Sheet				
		Attachments	C1	Leveraged Investment Information
			C2	Financing in Place
			C3	Timeliness to Completion
			C4	Physical Scope and Construction Jobs
			C5	End Use and Job Density
			C6	Vacant Property
			C7	Letter of Support
			C8	Strategic Plan in Place
			C9	Benefit to Low Income
			C10	Economic Development Innovation Zone and O.H.I.O Hub



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Appendix 5- Combined Federal and State Application Checklist

ODOD /OHPO		Checklist Components		
Submitted	Not Submitted	Combined Federal and State Applications		
Part A: Basic Project Information				
		Attachments	A1	Ownership Declaration form
			A2	Project Information Summary
			A3	Project Description and Scope of Work
			A4	Proof of Ownership
			A5	Major Factor
			A6	Rationale for 'Staged' Project
Part B: Historic Application Information				
		Attachments	B1	Historic Building Designation Status
			B1.2	Federal Part 1 Cover Sheet and Signature
			B1.3	Federal Part 2 Cover Sheet and Signature
Part C: Self-Scoring Sheet				
		Attachments	C1	Leveraged Investment Information
			C2	Financing in Place
			C3	Timeliness to Completion
			C4	Physical Scope and Construction Jobs
			C5	End Use and Job Density
			C6	Vacant Property
			C7	Letter of Support
			C8	Strategic Plan in Place
			C9	Benefit to Low Income
			C10	Economic Development Innovation Zone and O.H.I.O Hub