



Historic Preservation Commission (HPC) Agenda

Tuesday, September 19, 2023 5:30 PM

Minturn Town Hall / 302 Pine St Minturn, CO

The agenda is subject to change, include the addition of items 24 hours in advance or the deletion of items at any time. The order and times of agenda items listed are approximate. This agenda can be viewed at www.minturn.org.

MEETING ACCESS INFORMATION AND PUBLIC PARTICIPATION

This will be an in-person meeting with access for the public to attend in person or via the Zoom link included. Zoom Link: <https://us02web.zoom.us/j/84972315264>

Zoom Call-In Information: **1 651 372 8299 or 1 301 715 8592 Webinar ID: 849 7231 5264**

Please note: all virtual participants are muted. In order to be called upon and unmuted, you will need to use the “raise hand” feature in the Zoom platform. When it’s your turn to speak, the moderator will unmute your line and you will have five (5) minutes for public comment.

PUBLIC COMMENTS: If you are unable to attend, public comments regarding any items on the agenda can be submitted to Madison Harris, Planner I, prior to the meeting and will be included as part of the record.

- 1. CALL TO ORDER – 5:30 PM**
- 2. ROLL CALL & PLEDGE OF ALLEGIANCE**
- 3. APPROVAL OF MINUTES**

3.1 August 15, 2023

- 4. APPROVAL OF AGENDA** *Opportunity for amendment or deletions to the agenda.*
- 5. DECLARATION OF CONFLICTS OF INTEREST**
- 6. PUBLIC COMMENT** *Citizens are invited to comment on any item not on the regular Agenda subject to a public hearing. Please limit your comments to five (5) minutes per person unless arrangements have been made for a presentation with the HPC Secretary. Those who are speaking are requested to state their name and address for the record.*
- 7. SPECIAL PRESENTATIONS** *Presentations are limited to 5 minutes. Invited presentations are limited to 10 minutes if prior arrangements are made with the HPC Secretary.*

7.1 Eagle County Historical Society – Kathy Heicher

8. **BUSINESS ITEMS** *Items and/or Public Hearings are listed under Business may be old or new and may require review or action by the HPC.*

9. **DISCUSSION / DIRECTION ITEMS**

9.1 Tax Credits and Incentives

10. **STAFF REPORTS**

11. **HISTORIC PRESERVATION COMMISSION COMMENTS**

12. **FUTURE AGENDA ITEMS**

13. **ADJOURN**



Historic Preservation Commission (HPC) Official Minutes

Tuesday, August 15, 2023 5:30 PM

Minturn Town Hall / 302 Pine St Minturn, CO

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MEETING ACCESS INFORMATION AND PUBLIC PARTICIPATION

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PUBLIC COMMENTS: If you are unable to attend, public comments regarding any items on the agenda can be submitted to Madison Harris, Planner I, prior to the meeting and will be included as part of the record.

1. CALL TO ORDER – 5:30 PM

Historic Preservation Commission Chair Ken Halliday called the meeting to order at 5:33 p.m.

2. ROLL CALL & PLEDGE OF ALLEGIANCE

Those present at the meeting: HPC Chair Ken Halliday and HPC Members Tracy Andersen, Kenneth J. Howell, and Kelly Toon.

Staff Member Present: Planner I Madison Harris

Note: HPC Vice Chair Larry Stone is excused absent.

3. APPROVAL OF MINUTES

3.1 July 18, 2023

Motion by Kelly T., second by Tracy A., to approve the minutes of July 18, 2023 as presented. Motion passed 4-0.

Note: Larry S. is excused absent.

4. APPROVAL OF AGENDA *Opportunity for amendment or deletions to the agenda.*

Motion by Kelly T., second by Tracy A., to approve the agenda as presented. Motion passed 4-0.

Note: Larry S. is excused absent.

5. DECLARATION OF CONFLICTS OF INTEREST

No conflicts of interest.

- 6. PUBLIC COMMENT** *Citizens are invited to comment on any item not on the regular Agenda subject to a public hearing. Please limit your comments to five (5) minutes per person unless arrangements have been made for a presentation with the HPC Secretary. Those who are speaking are requested to state their name and address for the record.*

- 7. SPECIAL PRESENTATIONS** *Presentations are limited to 5 minutes. Invited presentations are limited to 10 minutes if prior arrangements are made with the HPC Secretary.*

- 8. BUSINESS ITEMS** *Items and/or Public Hearings are listed under Business may be old or new and may require review or action by the HPC.*

9. DISCUSSION / DIRECTION ITEMS

9.1 Tax Credits and Incentives – History Colorado, Sara Kappel

Sara Kappel, State Incentives and Tax Credits, gave a presentation which is attached to these minutes as an appendix.

Ken H. described what he, Kelly T. and a member of the public are working to accomplish with moving a recently designated structure to Little Beach Park which will need a foundation which is has not historically had.

- Ms. Kappel did not know if this would qualify for the tax credits and said that more conversations would need to take place with additional State Historical Fund (SHF) staff, but restoring things that have been lost could qualify. A non-profit organization is the one who will need to apply for the work to be done as well as the tax credits.

Kelly T. said that people are often intimidated by grant applications so wanted to know the extent experience needed to apply for these grants.

- Ms. Kappel said that the tax credit applications can be filled out by the everyday person, the main proponent is a work plan. For the SHF grant, it takes more work, but examples of successful applications are provided to see what other people have done.

Note: Kenneth H. left the meeting at 7:15 p.m.

10. STAFF REPORTS

10.1 Historic Preservation Commission Appointment

Ms. Tracy Andersen's seat on the commission was up on July 31, 2023. She reapplied to fill that seat and was appointed by the Town Council via Resolution 20 - Series 2023 to the Historic Preservation Commission for a three year term. Congratulations Ms. Andersen!

11. HISTORIC PRESERVATION COMMISSION COMMENTS

Tracy A. said it might behoove one of the HPC to stand up at an event like the Hometown Throwdown to talk about Historic Preservation.

12. FUTURE AGENDA ITEMS

13. ADJOURN

Motion by Tracy A., second by Kelly T., to adjourn the regular meeting of August 15, 2023 at 7:31 p.m. Motion passed 3-0.

Note: Larry S. and Kenneth H. are excused absent.

Ken Halliday, Commission Chair

ATTEST:

Michelle Metteer, Town Manager

Local Landmarking and Incentives

— Ins and Outs of Preservation
Incentives —

Basics

- All work *MUST* meet the Secretary of the Interior's Standards for Rehabilitation
 - The Standards pertain to historic buildings of all materials, construction types, sizes, and occupancy including exterior and interior
 - As well as landscape and new construction or adjacent
- Rehabilitation is the ability to meet a new need or add to a historic property to meet continuing or changing uses while retaining the property's historic character
- Things to consider: Identify the Period of Significance; What makes the site special; Does the work retain key elements; Does the new construction complement the existing

Standard #1

- Standard #1: Serving historic or new use



Standard #2

- Standard #2: Historic character of a property shall be retained and preserved



Standard #3

- Standard #3: Avoid false sense of development
 - Combining architectural features from different styles
 - Physical record of its time, place, and use

Standard #4

- Standard #4: Materials and changes have gained their own historic significance



Standards #5 and #6

- Standard #5: Character -defining features shall be preserved
- Standard #6: Repair or replace in -kind



Standard #7

- Standard #7: Appropriate treatments



Standard #8

- Standard #8: Significant archaeological resources affected by a project shall be protected and preserved
 - Archaeological Monitoring
 - Undeveloped properties
 - Finished versus unfinished spaces

Standards #9 and #10

- Standard #9: New Construction shall be compatible
 - Massing, size, scale, and architectural features
- Standard #10: New Construction can be removed with little damage to the existing structure



Perks to Local Designation

- Recognition
- Owners have access to professional guidance
- INCENTIVES!!

Role as a CLG

- Only locally landmarked under a CLG for HPTC
- Act as the public entity
- Preliminary review
- Partake in approving work with planning department
- Design Guidelines that align with the Standards

Tax Credits and Grants

— Incentives for commercial and
residential properties —



State Historical Fund

- Gambling tax revenue for the gaming towns
- Grants for all types of projects
 - Education, Archaeology, Survey, Planning, Construction
- Two types of grants: Non Competitive and Competitive Grants
- Grants from \$1 -\$250,000 with a cash match
- Strong public benefit and urgency



State Level Tax Credits: Commercial

State Historic Preservation Tax Credits (HPTC)

- Who qualifies?
 - Designated properties
 - Private Owners
 - Non-Profits
 - Long-Term Leases
- Qualified Expenses
 - Commercial
 - \$10 million
 - Minimum \$20,000
 - 30-35% commercial
 - Cap of \$1 million
 - Keep or sell credits



State Level Tax Credits: Residential

State Historic Preservation Tax Credits (HPTC)

- Who qualifies?
 - Designated properties
 - Private Owners
 - Primary Residence (1st, 2nd, etc.)
- Qualified Expenses
 - Residential
 - 35%
 - Cap of \$50,000
 - 10 years to use the credits



So...what qualifies?

- Exterior: Masonry, windows, roof, foundation, restoring lost features
- Interior: Build outs, historic finishes (trim, plaster), mechanical, electrical, plumbing, flooring
- TIPS!
 - Could your grandparents/great grandparents recognize the building?
 - If you shake the building what falls out most likely doesn't count (tax credits)
 - Talk to staff EARLY; our guidelines don't always align with design review boards

How to Speak with your community

- Identify who might be needing work
 - Roof, adaptive reuse, energy efficiency, outdated mechanical systems
- Got a vacant building or a place that could use a facelift?
 - Want to restore missing features, looking to bring in new business
- Emphasize the minimum amount
 - \$5,000 for residential; \$20,000 for commercial
- Invest in the community
 - Hire local, buy local, sell the credits
- Myth about oversight and what you can or cannot do
 - Must meet the Standards, local guidelines versus State Office
- We are here to help!



Fun Quick Facts

- General needs and upgrades
- Easy process
- State Income Tax
- Hands on staff



Case Study: Leadville



Minturn Saloon

- Local landmark
- Privately Owned (2016)
- What is your role as the CLG ?
- What guidance would you provide?



Continue the Conversation

Sara Kappel

Tax Credits and Incentives Specialist

sara.kappel@state.co.us

303-549-6190





To: Historic Preservation Commission (“HPC”)
From: Madison Harris
Date: September 15, 2023
Agenda Item: Eagle County Historical Society - Kathy Heicher

INTRODUCTION:

HPC Member Tracy Andersen has been working with the Eagle County Historical Society to find time for their president Kathy Heicher to be able to come and give a presentation to the Historic Preservation Commission.

ANALYSIS:

From the Eagle County Historical Society’s website “The Eagle County Historical Society is a non-profit organization whose purpose is to educate Eagle County residents and visitors about Eagle County’s rich history. To that end, the society will maintain archives that are available to the public, operate a historical museum, and offer educational programs and special events related to the county’s history.” “Before Eagle County became known for its world-class ski resorts and high-end real estate, the county had a colorful history of nomadic Utes, adventurous mountain men, optimistic miners, and hard-working homesteaders. The Eagle County Historical Society works to preserve and share the county’s rich history. Knowing and understanding the people and forces that shaped the past makes us a better community today.”

COMMUNITY INPUT: Ongoing

BUDGET / STAFF IMPACT: TBD

STRATEGIC PLAN ALIGNMENT:

PRACTICE FAIR, TRANSPARENT AND COMMUNICATIVE LOCAL GOVERNMENT
SUSTAIN AND INVEST IN THE THINGS THAT DEFINE MINTURN AS A PROUD,
STURDY MOUNTAIN TOWN TO “KEEP MINTURN MINTURN”

ATTACHMENTS:

- [Eagle County Historical Society Website](https://eaglecountyhistoricalsociety.com/)

REFERENCES:

Spuhler, J. (2023, January 30). *About - Eagle County Historical Society*. Eagle County Historical Society. <https://eaglecountyhistoricalsociety.com/>



To: Historic Preservation Commission ("HPC")
From: Madison Harris
Date: September 15, 2023
Agenda Item: Incentives

INTRODUCTION:

The HPC requested that a discussion be had regarding incentives for the public for Historic Preservation.

REQUEST:

Discuss potential incentives to "market" to the public to showcase the benefits of designating property as historic landmarks.

ANALYSIS:

Below are benefits and incentives from Manitou Springs, Steamboat Springs, and Pueblo.

Manitou Springs

17.04.060 - Historic preservation district incentives.

The purpose of this section is to provide economic and other incentives to encourage and support the preservation, maintenance and appropriate rehabilitation of property and structures within the city's historic preservation district. The incentives and awards outlined in this section may be available to property within the city's historic preservation district.

- A. Reimbursement for colored concrete sidewalks per Section 12.20.070.E of this Code.
- B. The following incentives and assistance may be granted by the historic preservation commission when associated with a request for MCAC approval:
 - 1. Height restriction relief per Sections 18.64.020.e and 18.64.020.f of the Manitou Springs Zoning Regulations for new construction or alterations to an existing building.
 - 2. Side setback relief per Section 18.64.020.o of the Manitou Springs Zoning Regulations for new construction or alteration to an existing building.
 - 3. Financial award under the " Vicky Bunsen Doucette Memorial Mini-Grant for Maintenance of Historic Properties " subject to the provisions of the program and availability of annual funding.
 - 4. Issuance of a letter of support by the planning department for waiver or amendment of building code requirements not affecting the safety of a building. The letter may be issued when application of the building code would detrimentally impact the historic and architectural integrity of a contributing resource in the historic preservation district.
- C. When a MCAC approved by the commission has been completed and passed final

inspection by the city staff, the owner of the improved property shall be eligible to apply for the following incentive awards so long as said property is included in the historic preservation district:

1. Value Added Incentive Award.
 - a. An owner who constructs approved improvements to an existing contributing resource within a historic preservation district shall be entitled to claim an incentive award in an amount equal to one hundred percent of the city's share of income from ad valorem taxes so paid by said owner upon increased assessed valuation resulting from the improvements for the first five calendar years following reassessment of the property.
 - b. The amount of this claim shall be determined by applying the city mill rate levied in the year of the improvements to the difference between the assessed value before and after the improvements.
 - c. Said owner, or subsequent owner if the property is sold within the five-year period following improvements, may make annual claims for this award in the same amount in each of the five years immediately following the year in which the assessor has increased the assessed value of the improvements.
 - d. The annual claim shall be made on a form to be designed by the finance director and accompanied by the county treasurer's tax bill for the year before and after the improvements.
2. Use Tax Refund Incentive Award. Any person who constructs an approved structure or improvements to an existing building within a historic preservation district shall be eligible to apply for an award of fifty percent of the base use tax amount, excluding in late fees or charges, collected on the actual price paid for building materials and fixtures incorporated in the improvements. The term "actual price" is defined as the net result of reconciling the estimated use tax paid upon issuance of the building permit with the actual use tax paid upon completion of the improvements. An application for such an award shall be filed with the finance department.
3. Other Incentive Awards. Owners of property who qualify for incentive awards authorized in subsections (1) and/or (2) of this section are also eligible to apply for waiver of the following fees and charges specified elsewhere in the Municipal Code:
 - a. Up to fifty percent of historic preservation commission fees and charges (excluding those associated with demolition review).

Steamboat Springs

112.I Historic Preservation Incentives

As part of the City's historic preservation program, the following incentives are established:

1. Historic Preservation Fund

- a. In order to promote historic preservation of Historic Resources, Local Landmarks, and Historic Districts and to encourage the owners of Eligible Resources to list their properties on the Local Register, an Historic Preservation Fund is hereby established as part of the Planning and Community Development Department's operating budget.
- b. The Historic Preservation Fund may be funded with an annual appropriation from the City's budget, as determined by City Council in their discretion, as well as grants to the City from other governmental and private historic preservation organizations, individuals, or other sources.
- c. These funds shall be used by the Historic Preservation Commission to pursue its outreach and educational responsibilities to the community, as well as to purchase or assist the City in the purchase of development rights in appropriate cases.
- d. The Planning Director, with recommendations from the Historic Preservation Commission, shall administer the Historic Preservation Fund and account annually to City Council.

2. Economic and Regulatory Incentives

In order to induce owners of Eligible Resources to consider proposing their property for listing on the Local Register, the City may offer the owner of an Historic Resource, Local Landmark, or Contributing Property one or more of the following incentives:

- a. Federal and state income tax credits as provided by law, with reviews conducted by the Historic Preservation Commission by virtue of the City's certification as a Certified Local Government.
- b. Rebate of City sales taxes on materials purchased locally and used for rehabilitating, renovating, and restoring Historic Resources, Local Landmarks, and Contributing Properties in accordance with Section 22-183(d)(12) and Section 22-198(g) of the Municipal Code.
- c. Waiver of Planning Department permit fees in accordance with Section 702.K for work consistent with the Historic Preservation Design Guidelines and the Secretary of the Interior Standards.
- d. Recommendation for resources for architectural, design, and technical consultation and assistance at no or reduced fees.
- e. Identification and implementation of other economic incentives as they become available.
- f. Recommendation to City Council for the purchase of development rights, or for the City to cover the costs associated with the granting of preservation easements in appropriate cases.

3. Recognition

Owners of Historic Resources, Local Landmarks, and Contributing Properties shall be offered the opportunity to have an Historic Preservation Commission designed plaque or other appropriate marker placed on their property at the City's expense identifying their

property as listed on the Local Register.

Pueblo

Benefits and responsibilities of owning property listed as local landmarks or in local historic districts in Pueblo, Colorado.

Local landmarks and historic districts benefit the community by celebrating our distinct identity, preserves historic character, increases awareness of our heritage, encourages tourism, and is an economic benefit to property value.

Outreach to property owners, businesses, and service providers is one of the objectives of the Pueblo Historic Preservation Commission (HPC). Education about the benefits and obligations related to local historic resources is an important program of the HPC.

1. Studies in Colorado communities show that historic resource designations maintain or raise property values. There are no cases in Colorado where property values decreased following the historic designation of a property.
2. The owner of a historic resource is eligible to apply for state tax credits for an approved restoration plan. This typically applies to the exterior and, in some cases, any interior item that is listed on the nomination form that proposed the local designation. The State Historic Preservation Office in Denver, known as History Colorado, administers the state tax credits.
3. Local designation of historic resources normally does not extend into the interior of a home or business. Property owners are free to change the interior as they see fit.
4. The Historic Preservation Code (Code) and the Standards of Appropriateness (Standards) guide plan review for modifications to a local historic resource. They equally apply to all designated homes and businesses. Property owners, business owners, and service providers can expect that the City of Pueblo will enforce the regulations.
5. Exterior modifications (other than maintenance or landscaping) of buildings, monuments, objects, or sites require a Certificate of Appropriateness (CoA) from the HPC. A plan for one or more modifications should closely conform to the Standards. If the plan requires further consideration by the HPC, then the application will have a public hearing, where anyone may speak in favor of (or opposition to) the proposal. A CoA public hearing will require an application fee. Applications for demolitions also follow this process.
6. Administrative review for a CoA typically applies to signs and re-painting the same color. If the plan does not conform to the Standards, then City Planning staff will refer the application to the HPC. A complete application includes a photo of the existing historic resource, and manufacturer cut sheets of the proposed materials.
7. In rare cases, local historic resources such as homes or other types of buildings may be demolished. A plan for demolition should closely conform to the Standards, and the HPC may temporarily stay the demolition while a preservation alternative is sought.
8. In historic districts, a plan for new construction or infill should closely conform to the Standards, and the HPC may emphasize compatibility (not replication) with the historic character of a district.
9. A local historic resource is insurable. A reliable insurance provider should know what type of

policy is appropriate for properties of a certain age and historic integrity. Pueblo has over 150 landmarked properties that all have insurance. Some have special insurance to replace unique details such as hand- crafted wood features. In a case where a home or business is demolished, it would be delisted from the local inventory of cultural resources. Rebuilding an exact replica would not conform to the Standards because it would result in a false sense of history. If a demolished building was in a historic district, it may be rebuilt on site if the plan is compatible (without replication) with the district, per the Standards.

10. For public hearings of a CoA, applicants can expect a turnaround within 30 days. City Planning staff typically requires three weeks to write a report and recommendation. The HPC can meet once a month at a public hearing to approve or deny the proposal.
11. A property owner may apply for a Certificate of Economic Hardship, to be considered by the HPC at a public hearing, for relief from certain requirements of the Code.
12. A property owner adversely affected by a final decision of the HPC with respect to an application for a CoA, a demolition, or certificate of hardship may seek review by the City Council, per the Code.
13. A local designation does not change a property's zone district. Zone districts allow for a variety of land uses that meet the requirements of zoning ordinances.

COMMUNITY INPUT: Ongoing

BUDGET / STAFF IMPACT: TBD

STRATEGIC PLAN ALIGNMENT:

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STURDY MOUNTAIN TOWN TO "KEEP MINTURN MINTURN"

ATTACHMENTS:

- [Pueblo Historic Preservation Benefits and Responsibilities Website](#)
- [Steamboat Springs Community Development Code](#) (Historic Preservation starts on page 1-24 or page 36 of the pdf)
- [Sec. 17.04.060 - Historic preservation district incentives](#) - Manitou Springs
- State Historical Fund Flyer
- Tax Credit Reservation Application
- Tax Credit Issuance Application
- State Commercial Historic Preservation Tax Credits Flyer
- Work Plan Template
- Work Plan Example

HISTORY COLORADO



STATE HISTORICAL FUND

Let us help you save a historic place!

The State Historical Fund awards money to non profits and local governments - such as your town, city, or county - to save the places that matter in your community.

We do this by helping communities to identify historic places, nominate them for historic designation, and complete renovation and interpretive projects to keep historic places alive, loved, and useful for communities. Some examples of common projects include:

- Roof Replacement
- Window Repair
- Storefront Restoration
- Building Stabilization
- Structure Assessment
- Archaeology

There are a variety of ways to fund your project in Colorado, including State Historical Fund grants up to \$250,000. Call our friendly State Historical Fund Staff to share your ideas and learn more about the program.



See other side for
Frequently
Asked
Questions!



State Historical Fund grants were used to fund planning documents in preparation for construction for the Bain Building in Alamosa County.



The Star Filling Station in Weld County used State Historical Fund grants to pay for building stabilization.

For more information about grant deadlines or to set up a meeting, contact us at:

PHONE: 303-866-2825 | EMAIL: hc_shf@state.co.us

FREQUENTLY ASKED QUESTIONS



What is a historic place or site?

A historic place or site is at least 30 years old and is important to community, state, or national history. It can be a building, a ranch, a barn, a house, a school, a gymnasium, a rec center, a library, a hospital, a train station, or even an entire neighborhood! We can work with you to get your historic place or site recognized at the local, state, or even national levels. Once a site is designated as historic, it becomes eligible to receive funding from the State Historical Fund.

How does saving old buildings help my community?

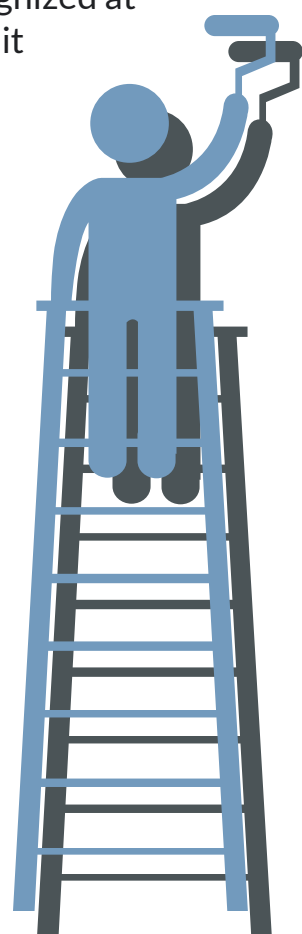
Saving old buildings keeps community memory alive and can encourage business opportunity, create jobs, provide training, and help the environment.

Do I need to be an expert in history or historic preservation?

No! Our engagement team is ready to guide you through the steps you need to take you get your place recognized and the application process. We can also explain the different funding options available through the State Historical Fund grants and other funding opportunities, including Preservation Tax Credits.

Are there any workshops or resources for people who are interested in applying?

Yes! We are currently working on our 2022 & 2023 Preservation Workshop calendar. If you're interested in setting up a workshop in your community, or to find out when we will be in your area, call us or send us an email (information at the bottom of this page). We also have more information available on our website at www.historycolorado.org/preservation-archaeology



For more information about grant deadlines or to set up a meeting, contact us at:

PHONE: 303-866-2825 | EMAIL: hc_shf@state.co.us

Commercial Historic Preservation Tax Credit Reservation Application

Applicant Information

Question: Property Owner or Qualified Tenant's Name:

Question: Property Owner or Qualified Tenant's Legal Entity Type:

☐ *Individual*

☐ *LLC*

☐ *S Corporation*

☐ *C Corporation*

☐ *501(c)*

☐ *Partnership*

☐ *Other*

Question: Property Owner or Qualified Tenant's Street Address:

Question: Property Owner or Qualified Tenant's City:

Question: Property Owner or Qualified Tenant's State:

Question: Property Owner or Qualified Tenant's Zip Code

Question: Property Owner or Qualified Tenant's E-mail:

Question: Property Owner or Qualified Tenant's Phone Number:

Question: Property Owner or Qualified Tenant's Taxpayer ID Number:

Question: Property Owner or Qualified Tenant's Colorado Account Number (optional):

Ownership Information

Question: Type of Property Ownership

- ☐ *Owner*
- ☐ *Lessee*
- ☐ *Contract Holder*
- ☐ *Option Holder*

Question: Date of Property Control

Question: If Leased, Number of Years Remaining on Lease

Property Information

Question: Property Name/Description

Question: Property physical Address

Question: Property City

Question: Property State

Question: Property Zip Code

Question: Property County

Question: Original Purchase Price of Entire Property at Time of Purchase

Question: Land Valuation

Question: Estimated Value of Property Immediately Before Rehabilitation:

Question: Estimated Value of Entire Property After Rehabilitation:

Question: If you have applied but are not yet listed on a historic register (either individually or as a contributing property), please list all registers and dates applied.

Question: If you are currently listed on a historic register (either individually or as a contributing property), please list all registers and dates listed:

Question: Square Footage of Property before Rehabilitation:

Question: Square Footage of Property After Rehabilitation:

Question: Is Property Currently Unused or Vacant?

☐ *Yes*

☐ *No*

Question: Current or Most Recent Use of Property:

- ☐ *Residential*
- ☐ *Office*
- ☐ *Retail*
- ☐ *Flex*
- ☐ *Industrial*
- ☐ *Agricultural*
- ☐ *Tourism*
- ☐ *Other*

Question: Intended Economic Use of Property After Rehab:

- ☐ *Residential*
- ☐ *Office*
- ☐ *Retail*
- ☐ *Flex*
- ☐ *Industrial*
- ☐ *Agricultural*
- ☐ *Tourism*
- ☐ *Other*

Question: Number of Residential Units Before Rehab:

Question: Number of Residential Units After Rehab:

Question: How does this rehabilitation benefit the neighborhood and the community? Please give definite examples.

Question: Is this property near public transportation?

☐ *Yes*

☐ *No*

Question: Estimated number of full-time equivalent employees on-site before the rehabilitation:

Question: Estimated number of full-time equivalent employees on-site after the rehabilitation:

Question: Estimated payroll of employees on-site before rehabilitation:

Question: Estimated payroll of employees on-site after rehabilitation:

Question: Estimated number of person-hours spent/to be spent by construction personnel in this rehabilitation:

Question: Estimated number of person-hours spent/to be spent by personnel on soft costs on this rehabilitation project.

Question: Gross annual income to owner from property before rehabilitation:

Question: Estimated gross annual income to owner from property after rehabilitation:

Question: Estimated capital to be invested by occupants after rehabilitation:

Question: What sort of energy efficiency certifications will this building have after the rehabilitation?

☐ *LEED*

☐ *Energy Star*

☐ *Improvements, but no Certification*

☐ *No Energy Efficiency Improvements*

Rehab Budget and Schedule

Question: Short Description of the Rehabilitation Project:

Question: Current Status of Rehabilitation/Construction:

- ☐ *Not Started*
- ☐ *Started but Currently Idle*
- ☐ *Under Active Construction*
- ☐ *Completed*

Question: Date of Start of Construction (Actual or Estimated, as applicable):

Question: Estimated Date Property will be Placed in Service:

Question: Do you have the funds and financing to complete the construction in one phase?

- ☐ *Yes*
- ☐ *No*

Question: Please list all financing sources (besides this tax credit) that you are using in this rehabilitation:

- ☐ *Bank/Institutional Loan*
- ☐ *Grant Program*
- ☐ *Government Loan*
- ☐ *Developer Equity*
- ☐ *Tenant Funding*
- ☐ *Other*

Question: Estimated Total Rehabilitation Expenditures:

Question: Estimated Total Qualifying Rehabilitation Expenditures:

Other Programs

Question: Have you applied for State of Colorado historic preservation tax credits for this property prior to this rehabilitation? Discuss any plans for multiple projects for the same property with History Colorado and OEDIT staff.

☐ *Yes*

☐ *No*

Question: Have you applied for or do you intend to apply for Federal historic preservation tax credits for this rehabilitation?

☐ *Yes*

☐ *No*

Question: Have you applied to, or do you intend to apply to any Colorado Economic Development programs? If so, which ones?

☐ *Colorado Creative Industries, Creative District Loan Fund*

☐ *Enterprise Zone, Vacant Bldg Rehab credit*

☐ *Community Development Block Grant*

☐ *DOLA REDI Program*

☐ *DOLA Main Street Program*

☐ *Other*

Question: Have you applied to or do you intend to apply to any History Colorado programs? If so, which ones?

Question: Would you like to be contacted by OEDIT or History Colorado about other programs?

☐ *Yes*

☐ *No*

Attachments

Question: Please Attach Proof of Property Control.

Question: Please Attach Appraisal or Assessment from Purchase:

Question: Please Attach your Work Plan:

Question: Please Attach Photographs of the Property Before Rehabilitation:

Question: Please Attach your Construction Drawings:

Attestation

Question: Other Comments:

Question: By submitting this document, I hereby certify that all information stated in this application is complete and accurate and in compliance with all application guidelines and all relevant federal laws and Colorado statutes to the best of my knowledge.

☐ *Yes*

☐ *No*

Commercial Historic Preservation Tax Credit Issuance Application

Applicant Information

Question: Name of Person Submitting this Request:

Question: Phone Number of Person Submitting this Request:

Question: E-mail of Person Submitting this Request:

Property Information

Question: Date the property was placed into service by National Park Services, or the Certificate of Occupancy Date, or the Certificate of Completion Date, or the finalized construction date attested by a licensed CPA:

Question: Does the actual rehab conform to the rehab plan?

☐ *Yes*

☐ *No*

Question: If the actual rehab does not conform to the rehab plan, describe the variances:

Question: What were the Total Rehab Expenditures?

Question: What were the Total Qualifying Rehab Expenditures?

Question: Date of Certificate of Occupancy (if applicable):

Question: Was the property in a declared major disaster area at any time between the date of submission of the full application and today?

☐ *Yes*

☐ *No*

Question: Did this rehabilitation project increase your community's resiliency by promoting economic diversification or through other means?

Question: Did this rehabilitation increase your community's resiliency to natural disasters through physical improvement to the property or surrounding infrastructure?

Question: Please describe the improvements to energy efficiency made to the property by this rehabilitation:

Attachments

Question: Please Attach Pictures to Prove the Rehab is Complete and Conforming.

Question: Please attach a scan of your certificate of occupancy

Question: Please attach a spreadsheet of your qualifying rehab expenditures.

Question: Please attach the accountant's review or audit.

Attestation

Question: Other Comments:

Question: By submitting this document, I hereby certify that all information stated in this application is complete and accurate and in compliance with all application guidelines and all relevant federal laws and Colorado statutes to the best of my knowledge.

☐ *Yes*

☐ *No*



State Commercial Historic Preservation Tax Credits

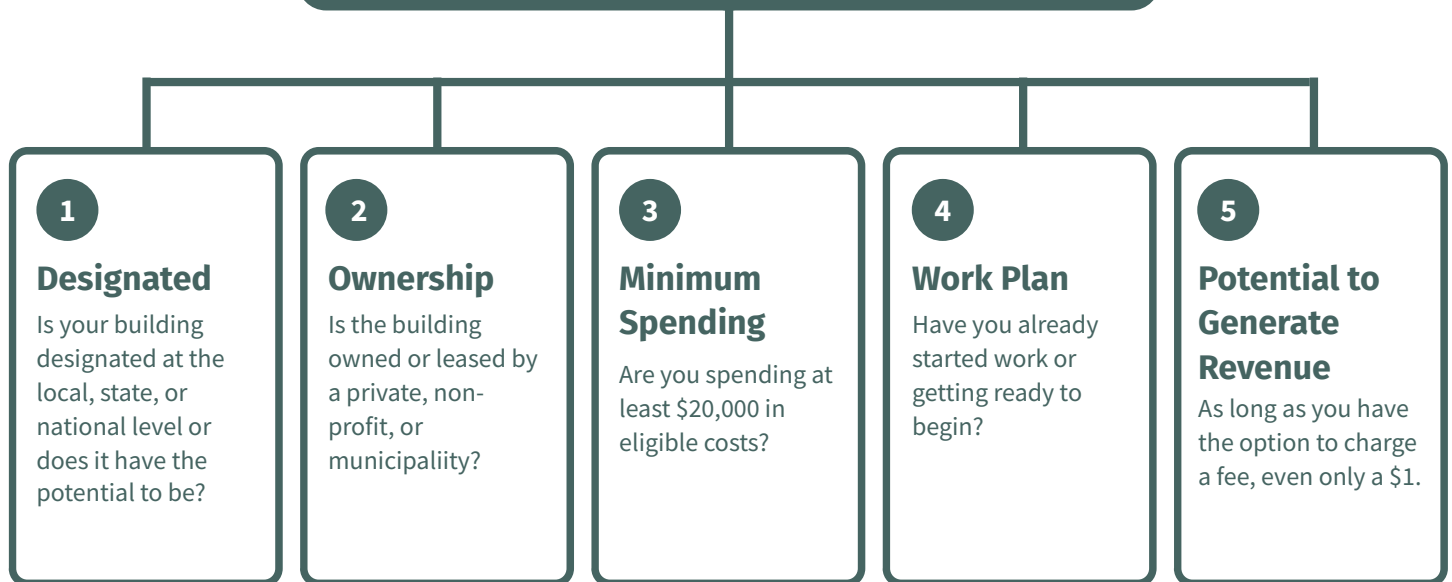


Historic Preservation Tax Credits are one type of preservation incentives available to commercial property owners in the state of Colorado.

They are a dollar for dollar reduction towards a state income tax liability or an applicant can sell all or a portion of the credits as money back for a lesser amount. Which makes it great for non-profits or organizations that have underutilized space but not a state income tax liability.



Do you have a project that is a good fit for the tax credits?



The state tax credit offers 20-35 percent on eligible costs depending on location.

The federal government also offers a tax credit of 20 percent, which can be paired with the Colorado state tax credit.

Federal and state tax laws offer tax credits for historic preservation projects that follow the Secretary of the Interior's Standards for Rehabilitation of Historic Properties.



State Residential Historic Preservation Tax Credits

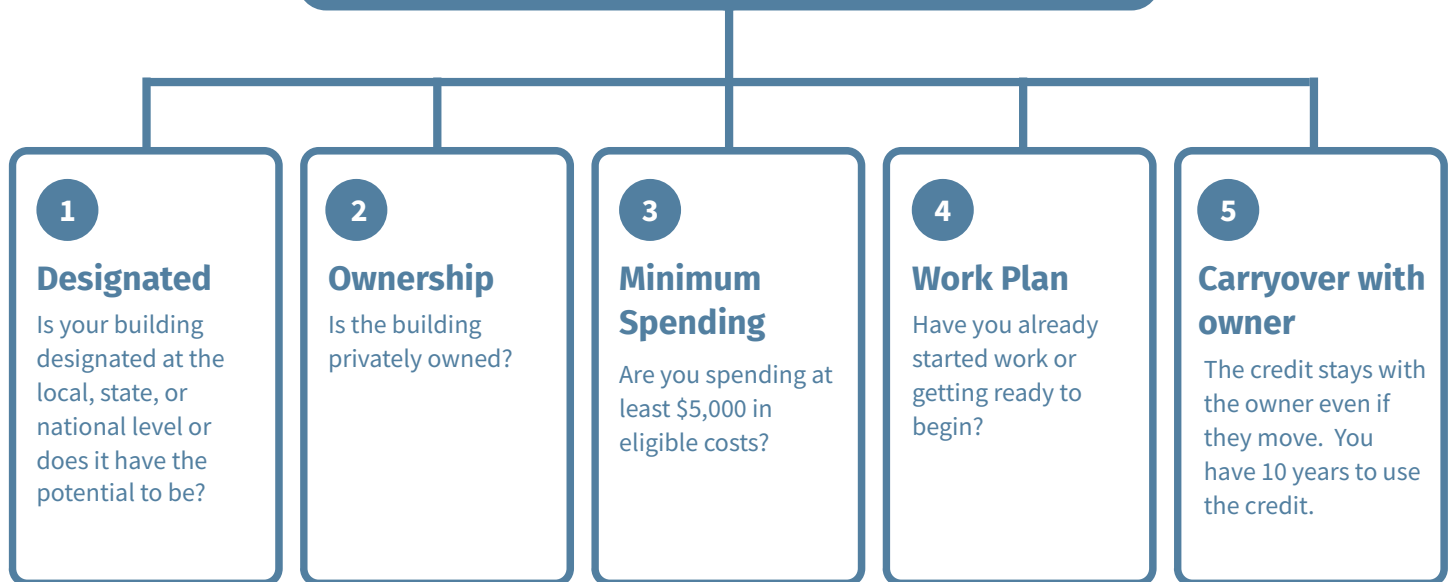


Historic Preservation Tax Credits are one type of preservation incentives available to private residential property owners in the state of Colorado.

They are a dollar for dollar reduction towards a state income tax liability. They can be applied for on any type of residential home as long as it is a private residence.



Do you have a project that is a good fit for the tax credits?



The state tax credit offers 20-35 percent on eligible costs depending on location.

State tax laws offer tax credits for historic preservation projects that follow the Secretary of the Interior's Standards for Rehabilitation of Historic Properties.

Maximum amount of credit return is \$50,000 and that is based on final qualified costs.

**APPLICATION FOR COLORADO STATE INCOME TAX CREDIT
FOR HISTORIC PRESERVATION (COMMERCIAL PROPERTY)**

Pursuant to House Bill 14-1311 (CRS 39-22-514.5)

WORK PLAN / DESCRIPTION OF PROPOSED WORK

PRELIMINARY APPROVAL

Ideally, a work plan and application should be submitted prior to the start of work. However, applications may also be submitted to the State after work has begun. If you have already begun a project, include both completed and uncompleted work in your description.

The work plan should be submitted online as part of your application. All applications for the Commercial Historic Preservation Tax Credit are submitted online through the Department of Economic Development and International Trade's web site (www.advancecolorado.com/hptc). This document can be uploaded to the web site along with any photographs and drawings that you would like to submit.

1. **DESCRIPTION OF PROPOSED REHABILITATION/PRESERVATION WORK.** In the numbered blocks, provide a description of the project. A separate block should be used to describe work on a specific feature (use as many additional sheets as necessary). Describe each feature and include its present condition, then describe the proposed work and the impact to the feature. Include labeled and numbered photographs of each feature. Use as many blocks as needed to completely describe the entire project. Examples of such features are: stairways, windows, doors, roofing, chimneys, floors, exterior and interior finishes, major spaces, etc. Drawings, if available, must be keyed to the descriptions. All proposed work on the project must be described, whether or not it is a qualified cost for the credit. For example, neither additions nor landscaping costs are allowable for the credit, nevertheless proposed additions and landscaping should be described.

2. **PHOTOGRAPHS OF THE BUILDING.** Provide photographs to adequately show all sides of the structure(s) as well as close up photographs showing details. Interior photographs are also required for any interior rehabilitation work that will be claimed for a tax credit. Photos should be clear and well-lit and may be either black & white or color.

3. **DRAWINGS AND PLANS.** Provide plans, sketch drawings, photo-simulations, and other items that show where work will be taking place. Floor plans are useful for showing changes to building interiors. Elevations are useful for showing proposed changes to the exterior.

PLEASE NOTE: History Colorado recommends that all applicants consult Publication 1322b (Colorado Historic Preservation Income Tax Credit) prior to completing this application.

This publication contains information on:

- Eligibility requirements for properties and taxpayers.
- Required review fees and project time limits.
- How to determine which costs are "qualified expenditures," and how to claim the tax credit.
- Frequently asked questions (FAQs) concerning the credit.

This publication can be found on our web site at www.historycolorado.org

(EXAMPLE TAKEN FROM A PAGE OF A SUBMITTED APPLICATION)

1

Architectural Feature Masonry

Describe feature and its condition:

Separation of the two wythes of masonry has resulted in damage to the brick arches above many of the windows, causing racking of window frames (especially the fixed closet window on the north elevation and the basement window on the east elevation), and poor fit of brick mold to brick at most window openings.

Describe work/impact on feature:

Shore and re-anchor wall: Vertically shore 6 window jambs (see plans for location), attempting to heave the exterior brick wythe back to its original plane. Install appx. 240 helical wythe ties to retie the failed original wythe tie system.

Repair window arches: Remove and rebuild 4 full window arches. Perform partial repair of 2 window arches (see plans for locations).

Repoint brick: Repoint missing and eroded mortar joints on all elevations. Use mortar that matches original in color and composition.

Photo # 5 – 10, 12, 15

Drawing # A-11, A-12

2

Architectural Feature Storm Windows

Describe feature and its condition:

The two existing storm windows on the north elevation do not require any carpentry work, but the finish and glazing are in poor condition.

Describe work/impact on feature:

Remove glass, strip paint. Make needed repairs to sash using epoxy. Prime the sash to receive paint. Reinstall original glass and new glazing putty. Paint sash to match existing paint scheme. Install new metal hangers at top of sash, and new keepers on sides. Re-hang storm windows.

Photo # 22, 23

Drawing # A-17

DESCRIPTION OF REHABILITATION

1

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

2

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

DESCRIPTION OF REHABILITATION (continued)

3

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

4

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

DESCRIPTION OF REHABILITATION (continued)

5

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

6

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

DESCRIPTION OF REHABILITATION (continued)

7

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

8

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

DESCRIPTION OF REHABILITATION (continued)

9

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

10

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

DESCRIPTION OF REHABILITATION (continued)

☐

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

☐

Architectural Feature _____

Describe feature and its condition:

Describe work/impact on feature:

Photo # _____ Drawing # _____

Phase 1 - Roof Rehabilitation and Future Rehabilitation Planning [REDACTED] [REDACTED]

Roof Scope

- Remove existing roofing materials including membrane and flashing
- Test for hazardous materials in roofing materials prior to removal
- Replace/install exterior roofing materials including membrane and flashing
- Replace roof system drainage components
- Install additional roof drainage components as necessary including interior roof drain
- Rehabilitate wood framing and sheathing where required
- Repair roof in other areas as necessary

Structural Scope

- Conduct any structural work from structural drawings that entails areas requiring future roof penetrations

Masonry Scope

- Rehabilitate masonry where needed to attach roof membrane and flashing components
- Rehabilitate masonry associated with roofing rehabilitation including repointing at parapet walls, rehabilitation of parapet caps, and repointing at the chimney

Architectural & Engineering Services

- Design construction documents for roof repairs and rehabilitation, masonry, and structural scope
- Perform construction administration for roof repairs and roof rehabilitation, masonry, and structural scope
- Design structural engineering documents for roof rehabilitation and to accommodate new mechanical/plumbing equipment for a future phase of construction
- Design mechanical/plumbing engineering documents for a future phase of rehabilitation
- Perform field documentation by mechanical, electrical, plumbing, and structural engineers & architect for creation of schematic design documents for a future rehabilitation phase
- Create narrative conditions, recommendations document, and annotated schematic drawings following review of utility connections & coordination with civil, mechanical, electrical, and plumbing engineers for future phase of rehabilitation
- Complete construction documents for rehabilitation of third and fourth floor windows and exterior masonry for a future phase of rehabilitation