

PETITION NUMBER _____ - _____ - _____
(FOR OFFICIAL USE ONLY)

DATE RECEIVED BY CITY AUDITOR AND CLERK: _____



Historic Preservation

CERTIFICATE OF APPROPRIATENESS APPLICATION PACKAGE

ADDITIONS, REHABILITATIONS, FENCES & SIGNS FOR HISTORICALLY DESIGNATED STRUCTURES

Applicability: Certificates of Appropriateness are required for building permits which affect historically designated building(s), structure(s), district(s), and site(s).

Application and Approval Process:

1. **Building Permit Application - Completeness Review:** Applicants should submit the required forms and drawings for a building permit to the Building Division. The applicant should be sure that a complete set of documents, including building drawings and a description of the scope of work, is submitted. The Building Division will refer the completed Building Permit Application to the Historic Preservation Board for review. Complete sets of building permit documents are required for a Certificate of Appropriateness Application.
2. **Certificate of Appropriateness Application:** Applications for a Certificate of Appropriateness are filed in the City Auditor and Clerk's office. Please see the attached Certificate of Appropriateness Submission Requirements Checklist.
3. **Certificate of Appropriateness Application - Completeness Review:** Upon receipt of a Certificate of Appropriateness Application from the City Auditor and Clerk's Office, the Planning and Development Division will review the application for completeness and may request additional information from the applicant. Applications will not be advertised and placed on the Historic Preservation Board's agenda until they have been deemed complete.
4. **If your project qualifies – Complete and Submit County Part I Tax Incentive Application:**

To: Sarasota County Historical Resources
6062 Porter Way
Sarasota, FL 34232
Phone: (941) 861-6888

Manager:
Robert Bendus

5. **Agenda Deadline for the Historic Preservation Board:** Applications for a Certificate of Appropriateness must be filed twenty-one (21) days prior to the Board meeting at which the applicant desires to present the proposed application. The Board normally meets on the second Tuesday of each month at 3:00 p.m.
6. **Notice of Public Hearing:** The notice of hearing will be publicly posted at Sarasota City Hall, 1565 1st Street three (3) days prior to the public hearing.
7. **Public Hearing:** The Historic Preservation Board will hold a quasi-judicial public hearing on each application for Certificate of Appropriateness. The applicant, or the legal agent of the applicant, must attend the public hearing to explain the request to the Board. Following the public hearing, the Board may grant, grant with conditions, or deny the Certificate of Appropriateness.

8. **Certificate of Appropriateness:** After the Board grants approval, or approval with conditions (and construction drawings are provided as requested), the Planning and Development Division will issue a Certificate of Appropriateness to the Building Division. A copy of the Certificate of Appropriateness will be issued to the applicant with the building permit.

Attachments:

- Certificate of Appropriateness Application Form
- Submission Requirements Checklist
- Certificate of Appropriateness for Historic Structures - Questionnaire
- Special Power of Attorney Affidavit Forms
- Tax Incentives for Historic Preservation

Further Information:

Call Dr. Clifford Smith of the Planning Department at (941) 263-6585

<p style="text-align: center;">Submission Requirements</p> <p style="text-align: center;"><i>NOTE: All items are to be folded to approximately 8 ½ X 11" size, collated and assembled into complete sets.</i></p>	<p style="text-align: center;">Please Check</p>
<p>Original and two (2) copies of this Certificate of Appropriateness Application Package. <i>(Includes checklist, application form, and questionnaire)</i></p>	<input type="checkbox"/>
<p>Original and two (2) copies of the Special Power of Attorney Affidavit. <i>[If applicable].</i></p>	<input type="checkbox"/>
<p>Documents submitted with a Building Permit Application, which have been reviewed for completeness by the Building, Zoning and Code Compliance Department, including:</p> <ul style="list-style-type: none"> ○ Ten (10) complete sets of construction drawings, no larger than 11 x 17 in size, and specifications. <i>[Only if applying for a significant change].</i> ○ Ten (10) copies of a site plan, no larger than 11 x 17 in size. ○ Original and two (2) copies of a written, detailed description of the scope of work. 	<input type="checkbox"/>
<p>Ten (10) copies of a perspective drawing, no larger than 11 x 17 in size, from all public right-of-ways. <i>[Only if applying for a new addition].</i></p>	<input type="checkbox"/>
<p>Three (3) sets of photographs showing relevant elevations of the existing structure(s), plus the proposed changes or additions to the site/structure. <i>(A photograph of the existing structure with the improvements sketched on top is very helpful.) (Digital Photographs on CD are acceptable)</i></p>	<input type="checkbox"/>

I HEREBY CERTIFY THAT THE INFORMATION STATED IN THE ATTACHED APPLICATION FOR CERTIFICATE OF APPROPRIATENESS IS TRUE AND CORRECT.

Name (please print)

(Signature)

For use by the office of the City Auditor and Clerk	
Received by: _____	Date: _____
Project Address: _____	Application Number: _____

Project or Structure Name:

Designation Petition Number (if known):

[For example 04-HD-01]

Site Address:

Tax PID #:

Existing Zoning:

Legal Description:

(Check if Attached)

Please DESCRIBE in detail the improvements to be permitted:

Please check here if a detailed SCOPE of WORK is attached.

Owner(s) Name:
<input type="checkbox"/> Check if Representative/Agent (requires a special power of attorney, see attached form)
Mailing address:
City:
State:
Zip:
Phone: ()
Fax: ()
E-Mail: (optional)

Representative's Name:
Mailing address:
City:
State:
Zip:
Phone ()
Fax: ()
E-Mail: (optional)

Owner's Signature(s): _____ Date: _____

Agent's Signature(s): _____ Date: _____

Questionnaire

If insufficient space is provided, please attach your response and any supplemental materials or explanation.

Property Address and Legal Description of the Site

Compliance with U.S. Secretary of Interior's Standards for Rehabilitation

The Historic Preservation Board will consider the ten (10) criteria below which are the U.S. Secretary of Interior's Standards for Rehabilitation per **Section VI-818 A**, in its review of COA applications. The Standards are to be applied to specific rehabilitation projects in a reasonable manner, taking into consideration economic and technical feasibility. **Please explain IN DETAIL how the proposed changes comply with the two primary criteria below.**

1. **How will the improved property be used? Will it be used for its historic purpose or will there be a new use that requires minimal change to the defining characteristics of the building and its site and environment?**

2. **How will the historic character of a property be retained and preserved? The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.**

The remaining eight criteria may or may not apply to the proposed changes. If criteria 3 through 10 apply to the proposed changes, please indicate how each applicable criteria will be met (attach additional sheets if necessary):

3. Each property shall be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.
4. Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
5. Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a property shall be preserved.
6. Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.
7. Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.
8. Significant archeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.
9. New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.
10. New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.

If criteria 3 through 10 apply to the proposed changes, please indicate how each applicable criteria will be met (attach additional sheets if necessary):

SPECIAL POWER OF ATTORNEY AFFIDAVIT (NOT CORPORATION)

**STATE OF FLORIDA
COUNTY OF SARASOTA**

This _____ day of _____

I, _____ of _____

the owner contract purchaser of _____

(describe zoning lot(s) by address and tax PIN number and attach legal description) make, constitute, and appoint _____

of _____ (insert address), my true and lawful attorney-in-fact, and

in my name, place and stead giving unto said _____

full power and authority to do and perform all acts and make all representations necessary, without any limitations whatsoever, to make application for said Certificate of Appropriateness Application.

The right, powers, and authority of said attorney-in-fact herein granted shall commence and be in full force and effect on this _____ day of _____, _____ and shall remain in full force and effect thereafter until actual notice, be certified mail, return receipt requested is received by the City of Sarasota Department of Planning & Redevelopment stating that the terms of this power have been revoked or modified.

Signature - Owner/Contract Purchaser (circle one)

Print Name: _____

**STATE OF FLORIDA
COUNTY OF SARASOTA**

The foregoing Special Power of Attorney Affidavit was acknowledged before me this _____ day of _____, _____, by _____ who is personally known to me or has produced _____ as identification.

Notary Public
State of Florida at Large

My commission expires: _____

SPECIAL POWER OF ATTORNEY AFFIDAVIT (CORPORATION)

STATE OF FLORIDA
COUNTY OF SARASOTA

This _____ day of _____, _____, I, _____
as _____ (title of officer) of _____ (name of corporation),
a _____ (state of incorporation) corporation, on behalf of the
corporation as the owner contract purchaser of _____ (describe zoning lot(s)
by address and tax PIN number and attach legal description) make, constitute, and appoint _____
_____ of _____ (insert
address), my true and lawful attorney-in-fact, and in my name, place and stead giving unto said _____
_____ full power and authority to do and perform all
acts and make all representations necessary, without any limitations whatsoever, to make application for
said Certification of Appropriateness Application.

The right, powers, and authority of said attorney-in-fact herein granted shall commence and be in full force
and effect on this _____ day of _____, _____ and shall remain in full force and effect
thereafter until actual notice, be certified mail, return receipt requested is received by the City of Sarasota
Department of Planning & Redevelopment stating that the terms of this power have been revoked or
modified.

Name of Corporation
By: _____
(Signature)
Print Name: _____
Title: _____

STATE OF FLORIDA COUNTY OF SARASOTA

The foregoing Special Power of Attorney Affidavit was acknowledged before me this _____ day of
_____, _____, by _____ (title of officer) of
_____ (name of corporation), on behalf of the corporation. He/she is
personally known to me or has produced _____ as identification.

Notary Public
State of Florida at Large

My commission expires: _____

Tax Incentives for Historic Preservation

Sarasota County and the City of Sarasota has enacted ordinances to assist property owners of designated structures. sThe National Park Service assists property owners in qualifying for federal investment tax credits for historic properties.

The Tax Exemption Ordinances:

Sarasota County's tax exemption regulation, Article V of Chapter 66 of the Sarasota County Code, and the City of Sarasota's Ordinance No. 18-5262 allows property owners to apply for an exemption on the increase in their ad-valorem taxes attributed to qualifying improvements on historically designated properties. The exemption applies to county and city ad valorem taxes for a period of up to ten years.

The tax exemption ordinance provides several benefits:

- o Exemption from increase in county / city ad valorem taxes
- o Transferability between owners for a period of up to ten years

Eligible improvements to real property include:

- o building additions
- o site improvements
- o removal of historically incompatible materials

The application is developed in concert with county preservation staff. **Applicants must apply for the Tax Exemption from the County before any work is started on the project.**

Final design review and approval is conducted by the County Historic Preservation Board in accordance with established guidelines for historic rehabilitations.

The final decision to grant or deny the exemption lies with the Sarasota Board of County Commissioners and the City of Sarasota Commission.

Here are a couple of examples:

An addition was completed on a historically designated property on the Siesta Key waterfront. The construction value of this large addition was \$65,000. The result was an increased assessment on the improvement of \$72,000. At the current millage rate of 3.93, this property owner would save \$283 annually with the tax exemption from the county as well as the additional millage from the city.

A historic structure on Coconut Avenue in downtown Sarasota underwent a major rehabilitation after a fire. The construction value of the remodeling was \$88,000 resulting in an increased assessment on the improvement of \$79,000. This property owner would save \$310 annually with the tax exemption from the county as well as the additional millage from the city.

How does a homeowner apply for the tax exemption?

Fill out the attached Part I County Application

(Save Part II for submission to the County at the completion of your project)

Submit Part I to the Sarasota County Historical Resources

6062 Porter Way

Sarasota, FL 34232

Phone: (941) 861-6888

Manager:

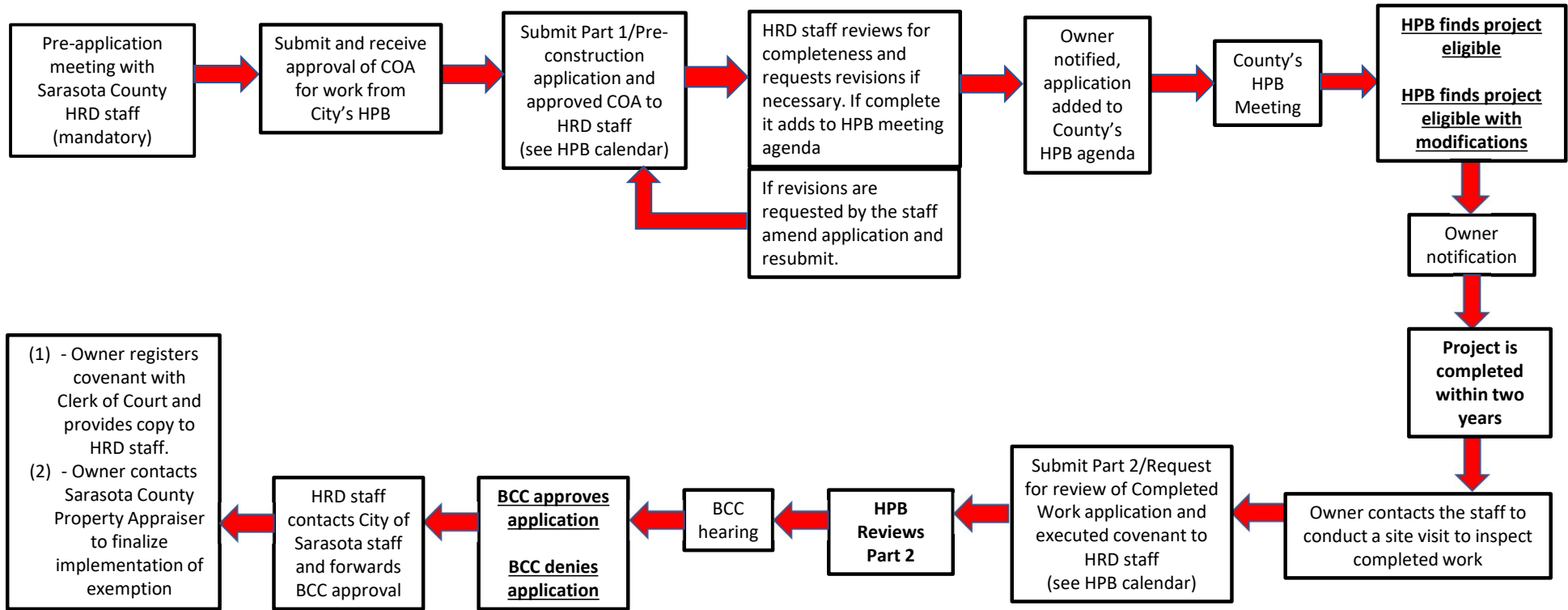
Robert Bendus

Open to the Public Monday – Thursday 10:00 am – 3:00 pm



HISTORIC PRESERVATION BOARD AD VALOREM TAX EXEMPTION PROCESS

(THIS PROCESS IS FOR PROPERTIES LOCATED WITHIN THE CITY OF SARASOTA)



Key to acronyms

- HRD – Historic Resources Division
- HPB – Historic Preservation Board
- BCC – Board of County Commissioners



HISTORIC PRESERVATION BOARD
APPLICATION FOR AD VALOREM TAX EXEMPTION
(PART 1 – PRE-APPLICATION)

APPLICATION INSTRUCTIONS (REV. 8/2018 and 4/2019)

Sarasota County has established an ad valorem tax exemption program for qualifying historic properties, which allows property owners that undertake significant restoration, renovation, or rehabilitation to a locally designated historic property seek an exemption on the ad valorem tax increase levied on that work. The exemption only applies to taxes levied by Sarasota County Government, it does not apply to taxes levied for the payment of bonds, municipal taxes, or taxes authorized by a vote of the electors pursuant to Section 9(b) or Section 12, Article VII, of the Florida Constitution. The exemption only applies to improvements to real property, and once granted remains in effect for a period not to exceed ten years. The exemption remains even if there are changes in the ownership of the qualifying property.

Chapter 66 - Article V, Sections 66-153 through 66-159 govern the ad valorem tax exemption program. The Historical Resources Division strongly encourages all applicants to read and familiarized themselves with that section of the code, specifically the application requirements. The application process is complex and the staff at Historical Resources can be reached for assistance in the process at (941) 861-6888.

Eligible Properties and Improvements:

Section 66-155 indicates the types of properties and improvements that qualify under this program

The property must meet the following criteria:

Must be locally designated under the provisions of a local historic preservation ordinance as an individual historic resource, or as a contributing property to a historic district, and the property meets the criteria for designation outlined in the Sarasota County Historic Preservation Ordinance 97-133 (Chapter 66, Article IV of the County Code)

The improvements must meet the following criteria per Section 66-155(2):

- The restoration, renovation, or rehabilitation work is consistent with the Design Guidelines and Secretary of the Interior’s Standards for Rehabilitation and Guidelines for Rehabilitating Historic Buildings; and
- Is equal to or greater than 15 percent of the assessed value of the property, excluding the value of the land, in the year in which the qualifying improvement was initiated; and
- Has an exterior component equal to \$2,500.00 or 15 percent of the project budget for improvements to real property, whichever is more, and
- Meets the criteria established in rules adopted by the Florida Department of State

Covenant:

To qualify for the exemption, the property owner must enter into a covenant or agreement with the Board of County Commissioners (BCC) for the term of the exemption. The covenant must be recorded with the deed of the property in the official records of Sarasota County. The covenant is binding on the current property owners, transferees, and their heirs, successors, or assigns. A sample covenant is available to all applicants at the Historical Resources Division.

Application Process:

The Historic Preservation Board reviews and recommends whether the property meets the criteria and requirements outlined above. However, it is up to the discretion of the BCC that tax exemptions are granted. Once the BCC has acted on the application, the applicant must contact the Sarasota County Property Appraiser to finalize the application process. It is the Property Appraiser, not the Historic Preservation Board, who ultimately calculates and administers the exemption.

The applicant should be aware of the following when considering the application process:

- A pre-submittal meeting with the staff at Historical Resources is mandatory
- The restoration, renovation, or rehabilitation work **MUST BE COMPLETED WITHIN TWO YEARS** of the date of preliminary approval from the Historic Preservation Board, (i.e., approval of Part 1 of the application)
- The ad valorem application process should be conducted simultaneously as the Certificate of Appropriateness process for the qualifying improvements whenever possible.
- If the subject property is located in one of the incorporated areas of the county. The applicant should work with both the local Historic Preservation Board in their municipality and the County's Historic Preservation Board. It is paramount that the applicant contact the county's Historical Resources Division staff in these situations at (941) 861-6888.

After-the-fact application:

Section 66-158(d) allows property owners to submit an after-the-fact ad valorem tax exemption application for the calendar year in which the work was performed. Such applications must be submitted on or before December 1st. It is paramount that the applicant contact the county's Historical Resources Division staff in these situations at (941) 861-6888.

Submittal:

The application and all required attachments must be printed and submitted as a complete package in person to the Historical Resources Division office. It is strongly advised that the applicant contact the staff to schedule an appointment to submit the application.

Please note that emailed applications **WILL NOT BE ACCEPTED**.

The Sarasota County Historic Preservation Board meets on the fourth Tuesday of every month*. Ad valorem exemption applications are due **three weeks** prior to the Historic Preservation Board meeting. Please contact the staff at Historical Resources Division prior to submitting the application to receive the Historic Preservation Board's calendar and submittal deadlines.

(* The Historic Preservation Board will change or cancel a regularly scheduled meeting owing to lack of quorum or other unforeseen circumstances)



**HISTORIC PRESERVATION BOARD
APPLICATION FOR AD VALOREM TAX EXEMPTION
(PART 1 – PRE-APPLICATION)**

GENERAL INFORMATION TO BE COMPLETED BY ALL APPLICANTS

A pre-application meeting with the staff of the Sarasota County Historical Resources Division is required before submitting this COA application to the Historic Preservation Board per Chapter 66 – Article IV (Sec 66-117(h)(1)).

Has such pre-application meeting taken place? YES _____ NO _____

PROPERTY INFORMATION:

Street Number _____ Street Name _____

City _____ County _____ Zip Code _____

Property Identification Number (PID): _____

(Please note, the PID number can be found on the Sarasota County Property Appraiser’s website at www.sc-pa.com//home)

Is the property locally designated to the Sarasota County Register of Historic Places?

YES _____ NO _____

If the answer above is NO, please list the local municipality and register on which the subject property is officially listed:

(Please attach a copy of the local designation report and designation resolution if not listed to the Sarasota County Register of Historic Places)

PROPERTY OWNER INFORMATION

Name of individual(s) or organization owning the property _____

Mailing address of property owner:

Street Number _____ Street Name _____

City _____ State _____ Zip Code _____

Property Owner Telephone Number (please include area code) _____

Property Owner Email Address _____

APPLICANT INFORMATION

Name of individual representing the application. If an authorized agent other than the property owner is representing the application, then the "Authorized Agent" information below must be completed in order to process this application. Please note that if an authorized agent is listed below, all communications related to this ad valorem tax exemption application will be directed to the authorized agent, not the property owner.

please check one of the two options below:

- A. Application will be represented by property owner: YES _____
- B. Application will be represented by an authorized agent: YES _____

AUTHORIZED AGENT INFORMATION

Name of individual representing the property owner _____

Organization _____

Mailing address of authorized agent:

Street Number _____ Street Name _____

City _____ State _____ Zip Code _____

Authorized agent telephone number (please include area code) _____

Authorized agent email address _____

PROJECT INFORMATION:

Section 66-157(b) indicates that when applicable and to the extent possible, the review of the application should be conducted simultaneously with the process for issuance of a certificate of appropriateness (COA) for the subject improvements, pursuant to Chapter 66, Article IV, of the Sarasota County Code.

If the subject property is located in unincorporated Sarasota County, please complete **section A**
If the subject property is located in an incorporated municipality, please complete **section B**

Section A (Properties located in unincorporated Sarasota County)

Please check **ALL** the following that apply to this ad valorem tax exemption application:

_____ This Part 1 ad valorem tax exemption application is being submitted simultaneously with a COA to the Sarasota County Historic Preservation Board.

_____ This Part 1 ad valorem tax exemption application is being submitted as an after-the-fact application to the Sarasota County Historic Preservation Board.

- If this Part 1 ad valorem tax exemption application is being submitted simultaneously with a COA to the Sarasota County Historic Preservation Board, please complete attachment A at the end of this application and submit both, the completed Part 1 application and attachment A with your COA application to Historical Resources.
- If this Part 1 ad valorem tax exemption application is being submitted as an after-the-fact application to the Sarasota County Historic Preservation Board, please complete Part 1 application, and attachment A at the end of the application and include the following required attachments:

Attachment 1: Project description letter which must include a detailed description of the restoration, renovation, or rehabilitation that took place and its effect(s) on the historic resource. The letter **MUST INCLUDE** a time line of the improvements with the date of commencement and the date of completion of the improvements.

Attachment 2: Panoramic (4 X 6), or (8.5 X 11) **BEFORE** and **AFTER PHOTOGRAPHS** of all elevations of the historic resource Please ensure that the photos provide a descriptive view of the area where the improvements took place.

Attachment 3: Nine copies of annotated plans and elevations of the improvements. All drawings must be 11 by 17.

Attachment 4: Catalogue information, shop drawings, manufacturer’s brochures, or samples of new materials or building components included in the completed improvements.

Section B (Properties located in an incorporated municipality within Sarasota County)

Please check **ALL** the following that apply to this ad valorem tax exemption application:

_____ This Part 1 ad valorem tax exemption application is being submitted after approval of the COA review process from a municipal historic preservation Board recognized as part of a Certified Local Government Program (CLG)* has been granted.

(Please note that as of 2018, only the City of Sarasota has a recognized CLG program. City of Venice, City of North Port, and the Town of Long Boat are not recognized as CLG. In those cases, the COA application must be submitted to the Sarasota County Historic Preservation Board for their review along with the ad valorem application)*

_____ This Part 1 ad valorem tax exemption application is being submitted as an after-the-fact application to the Sarasota County Historic Preservation Board.

- If this Part 1 ad valorem tax exemption application is being submitted once the City of Sarasota Historic Preservation Board has reviewed and approved the COA for the subject improvements, please complete attachment A at the end of this application and submit both, the completed Part 1 application and attachment A along with the approval letter and COA application that was reviewed by the City of Sarasota Historic Preservation Board.
- If this Part 1 ad valorem tax exemption application is being submitted as an after-the-fact application to the Sarasota County Historic Preservation Board, please complete Part 1 application, and attachment A at the end of the application along with the approval letter and COA application that was reviewed by the City of Sarasota Historic Preservation Board. In addition, please include the following attachment:

Attachment 1: Project description letter which must include a detailed description of the restoration, renovation, or rehabilitation that took place and its effect(s) on the historic resource. The letter **MUST INCLUDE** a time line of the improvements with the date of commencement and the date of completion of the improvements.

If the property is located in the City of Venice, City of North Port, or Town of Long Boat, the Sarasota County Historic Preservation Board must review the COA application along with the Part 1 ad valorem tax exemption application. If the property is located in any of the three municipalities listed above, please contact the staff at Sarasota County Historical Resources Division for guidance. The staff can be contacted at (941) 861-6888.

OWNER ATTESTATION

I _____ hereby attest that the information I have provided is, to the best of my knowledge, correct, and that I own the property described above, or that I am legally the authority in charge of the property, or authorized to represent the property. Further, by submission of this Application, I hereby agree to allow access to the property by representatives of the Sarasota County Division of Historical Resources for the purpose of verification of information provided in this application.

Signature

Date

SUBMITTAL:

The Sarasota County Historic Preservation Board meets on the fourth Tuesday of every month*. Ad valorem tax exemption applications are due **three weeks** prior to the meeting. Please contact the staff at Historical Resources Division prior to submitting this application. The application and all required attachments must be printed and submitted as a complete package in person to the Historical Resources Division office. It is strongly advised that the applicant contact the staff to schedule an appointment to submit the application.

Please note that emailed applications **WILL NOT BE ACCEPTED.**

(* The Historic Preservation Board will change or cancel a regularly scheduled meeting owing to lack of quorum or other unforeseen circumstances)

(ATTACHMENT A)

Please complete and submit with Part 1 ad valorem tax exemption application

1- PROPERTY INFORMATION:

Street Number _____ Street Name _____

City _____ County _____ Zip Code _____

Property Identification Number (PID): _____

(Please note, the PID number can be found on the Sarasota County Property Appraiser's website at www.sc-pa.com//home)

The improvements must meet the following criteria per Section 66-155(2):

"Has an exterior component equal to \$2,500.00 or 15 percent of the project budget for improvements to real property, whichever is more"

2- PRELIMINARY PROJECT BUDGET:

Interior Budget: _____

Exterior Budget: _____

Total Project Budget: _____

15% of Total Project Budget: _____

Section 66-151 "Qualifying Improvement" means changes in the condition or real property brought about by the expenditure of labor or money for the restoration, renovation or rehabilitation of such property. Improvements include additions and accessory structures necessary for efficient contemporary use".

The improvements must meet the following criteria per Section 66-155(2):

"Is equal to or greater than 15 percent of the assessed value of the property, excluding the value of the land, in the year on which the qualifying improvement was initiated; and

3- ASSESSED VALUE (From Sarasota County Property Appraiser):

Assessed improvement value: _____

15% of assessed improvement value: _____

Signature of property owner(s): _____

Owner(s) name(s) (printed): _____



Sarasota County

HISTORIC PRESERVATION BOARD

APPLICATION FOR AD VALOREM TAX EXEMPTION (PART 2 – REQUEST FOR REVIEW OF COMPLETED WORK)

GENERAL INFORMATION TO BE COMPLETED BY ALL APPLICANTS

This ad valorem tax exemption application Part 2 must be superseded by an ad valorem tax exemption Part 1 application.

Has the Sarasota County Historic Preservation Board reviewed and approved a Part 1 application for this project? YES _____ NO _____ If yes, include the date of the HPB meeting _____

Historical Resources Division staff must conduct a site visit to the property to inspect the completed work per Chapter 66 – Article IV (Sec 66-158(b)).

Has the staff conducted this mandatory site visit? YES _____ NO _____

All work associated with an ad valorem tax exemption must be completed within two years of the date of preliminary approval of the Historic Preservation Board per Chapter 66 – Article IV, Sec 66-158(a).

Has the work being completed within the required two years? YES _____ NO _____

(If the answer is no, please include a cover letter explaining in detail the reasons for the project overruns)

PROPERTY INFORMATION:

Street Number _____ Street Name _____

City _____ County _____ Zip Code _____

Property Identification Number (PID): _____

(Please note, the PID number can be found on the Sarasota County Property Appraiser's website at www.sc-pa.com//home)

Is the property locally designated to the Sarasota County Register of Historic Places?

YES _____ NO _____

If the answer above is NO, please list the local municipality and register on which the subject property is officially listed:

PROPERTY OWNER INFORMATION

Name of individual(s) or organization owning the property _____

Mailing address of property owner:

Street Number _____ Street Name _____

City _____ State _____ Zip Code _____

Property Owner Telephone Number (please include area code) _____

Property Owner Email Address _____

APPLICANT INFORMATION

Name of individual representing the application. If an authorized agent other than the property owner is representing the application, then the "Authorized Agent" information below must be completed in order to process this application. Please note that if an authorized agent is listed below, all communications related to this COA application will be directed to the authorized agent, not the property owner.

please check one of the two options below:

- A. Application will be represented by property owner: YES _____
- B. Application will be represented by an authorized agent: YES _____

AUTHORIZED AGENT INFORMATION

Name of individual representing the property owner _____

Organization _____

Mailing address of authorized agent:

Street Number _____ Street Name _____

City _____ State _____ Zip Code _____

Authorized agent telephone number (please include area code) _____

Authorized agent email address _____

PROJECT INFORMATION:

1- ASSESSED VALUE (From Sarasota County Property Appraiser):

Assessed improvement value in year project was initiated: _____

15% of assessed improvement value in year project was initiated: _____

Project Starting date: _____

Project Completion date: _____

The improvements must meet the following criteria per Section 66-155(2):

“Has an exterior component equal to \$2,500.00 or 15 percent of the project budget for improvements to real property, whichever is more”

2- FINAL PROJECT COSTS:

Final Interior Project Costs: _____

Final Exterior Project Costs: _____

Final Project Cost: _____

15% of Total Project Budget: _____

OWNER ATTESTATION

I _____ hereby attest that the information I have provided is, to the best of my knowledge, correct, and that I own the property described above, or that I am legally the authority in charge of the property, or authorized to represent the property. Further, by submission of this Application, I hereby agree to allow access to the property by representatives of the Sarasota County Division of Historical Resources for the purpose of verification of information provided in this application.

Signature

Date

To qualify for an exemption, the property owner must enter into a covenant or agreement with the Board of County Commissioners for the term of the exemption per Chapter 66 – Article IV (Sec 66-154).

Has the covenant for this ad valorem tax exemption application been completed, signed, and notarized?

Yes _____ NO _____ (Please attach the **SIGNED AND NOTARIZED ORIGINAL** covenant to this Part 2 application)

3- REQUIRED ATTACHEMENTS:

Attachment 1: Costs breakdown letter, which must include an itemized list of how the project costs were spent on the improvements (i.e. windows, landscaping, roofing, flooring, etc)

Attachment 2: Project description letter which must include a detailed description of the restoration, renovation, or rehabilitation that took place and its effect(s) on the historic resource. The letter **MUST INCLUDE** a time line of the improvements with the date of commencement and the date of completion of the improvements. If any changes or amendments took place to the plans after the COA approval was granted, please explain what those changes are and the reasons for them.

Attachment 3: Panoramic (4 X 6), or (8.5 X 11) **BEFORE** and **AFTER PHOTOGRAPHS** of all elevations of the historic resource Please ensure that the photos provide a descriptive view of the area where the improvements took place.

Attachment 4: Signed and notarized original covenant

SUBMITTAL:

The application and all required attachments must be printed and submitted as a complete package in person to the Historical Resources Division office. It is strongly advised that the applicant contact the staff to schedule an appointment to submit the application.

Please note that emailed applications **WILL NOT BE ACCEPTED.**

The Sarasota County Historic Preservation Board meets on the fourth Tuesday of every month*. Ad valorem exemption applications are due **three weeks** prior to the Historic Preservation Board meeting. Please contact the staff at Historical Resources Division prior to submitting the application to receive the Historic Preservation Board's calendar and submittal deadlines.

(* The Historic Preservation Board will change or cancel a regularly scheduled meeting owing to lack of quorum or other unforeseen circumstances)