

Boarding House Historic District Preservation Plan

April 1, 2016

Prepared for
The City of Excelsior Springs, Missouri



vireo


STRATA
ARCHITECTURE + PRESERVATION

Acknowledgements

Mayor

- Mayor Ambrose Buckman

City Council

- Councilman Brent McElwee
Mayor Pro-Tem Brad Eales
Councilwoman Sharon Powell
Councilwoman Sonya Morgan

City Manager

- David Haugland

City Staff

- Jaime Blackburn, Community Development Administrative Assistant
- Steve Marriott, Finance Department Director
- Shannon McGuire, Planning & Zoning Department Director
- Larry Murry, Inspections Department Director

Landmarks Commission

- Betty Bissell
- Craig Bohnert
- Marilyn Gerdes
- Patrick Grass
- Stephany Hughes
- Lance Lamb
- Molly McGovern
- Brandee Soria

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- Compel Absentee Landlords To Be Responsive And Responsible
- Complete the Historic Resources Survey And Potential Historic District Designation
- Preserve Urban Design and Neighborhood Character
- Enhance The Perception Of A Safe Neighborhood
- Replace And/Or Install Sidewalks
- Implement Traffic Management And Traffic Calming Measures

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Introduction

This Preservation Plan is the Boarding House Historic District team and neighborhood's recommendation to the City for implementation. While these strategies reflect our understanding of the first steps to implement the plan, the City Staff will evaluate these recommendations, present priorities and objectives to the City Council, and make funding recommendations to City Council on how to meet the needs for achieving these priorities and objectives.

This Plan identifies priority strategies that the Boarding House Historic District team and neighborhood residents recommend be immediately initiated by the City of Excelsior Springs, and targeted for completion within a one to ten year timeframe. It also helps to prioritize projects and programs that should be funded through the operating budget and should help inform future grant priorities. In addition to guiding future funding decisions, the strategic plan provides a framework to enable and promote public/private partnerships that will result in benefits to the City and its residents.

This Plan should be adopted as an amendment to the City's Comprehensive Plan, should be updated every one to two years, and should be incorporated in the City's work program. Once the strategies have been recommended, the City should prioritize the next round of implementation projects or programs and make recommendations to Council for meeting the needs and objectives of priorities.

This Plan details sixteen initial strategies that will begin to implement the Boarding House Historic District Plan and move the neighborhood towards a new direction.

■ Things the City Can Do

- Identify Neighborhood Best Practices
- Return Abandoned Buildings And Vacant Lots To A Position Of Use
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- Develop And Maintain A Strong Neighborhood Organization
- Increase And Improve Communication
- Build Neighborhood Partnerships
- Actively Pursue Neighborhood Property Maintenance
- Develop And Maintain A Clean Neighborhood

As these strategies are executed citizens will see concrete achievements that move the neighborhood toward a shared vision for the future.

Purpose of the Neighborhood Action Plan

The purpose of this project is to determine the common needs of the Boarding House Historic District Neighborhood, how those needs might best be addressed by the neighborhood, community partners, and the City, and to devise strategies for addressing those needs. These needs, and the strategies to meet them, are compiled into this Neighborhood Preservation Action Plan.

The neighborhood planning process is intended to produce a plan that reflects neighborhood residents' desires to the greatest extent possible. Through the process, the neighborhood can direct its assets towards its most critical needs to enhance neighborhood livability. More specifically, the Neighborhood Preservation Action Plan is intended to:

- Raise awareness about neighborhood needs and concerns for the future.
- Promote collaboration and a sense of shared responsibility between the neighborhood, its' potential partners, and the City utilizing a "To Do" list.
- Initiate change by identifying and using existing neighborhood assets.

If the plan reflects the values and priorities of the entire neighborhood, it will aid efforts toward support and implementation.

Neighborhood Assessment Workshop

On November 21, 2015, residents and members of the Boarding House District Neighborhood gathered at the Good Samaritan Center (108 S. Thompson Ave.) to participate in a Neighborhood Assessment Workshop. The Neighborhood Assessment Workshop was the first of three public meetings members of the neighborhood and Historic Preservation Commission would hold while in the process of developing a Neighborhood Preservation Action Plan.



Public and Neighborhood Meetings

On Wednesday, February 10, 2016 the local Historic Preservation Commission and the public were consulted for a second time at the City Council Chambers to review and discuss the draft Neighborhood Preservation Plan. This meeting included the review of the findings from the first neighborhood meeting, discussions about the City's vision for the neighborhood and the ability to review and comment on the Draft Plan. The participants identified quick wins for immediate action, critical initiatives for implementation during 2016 and identified key dates for follow-up meetings for the above tasks.



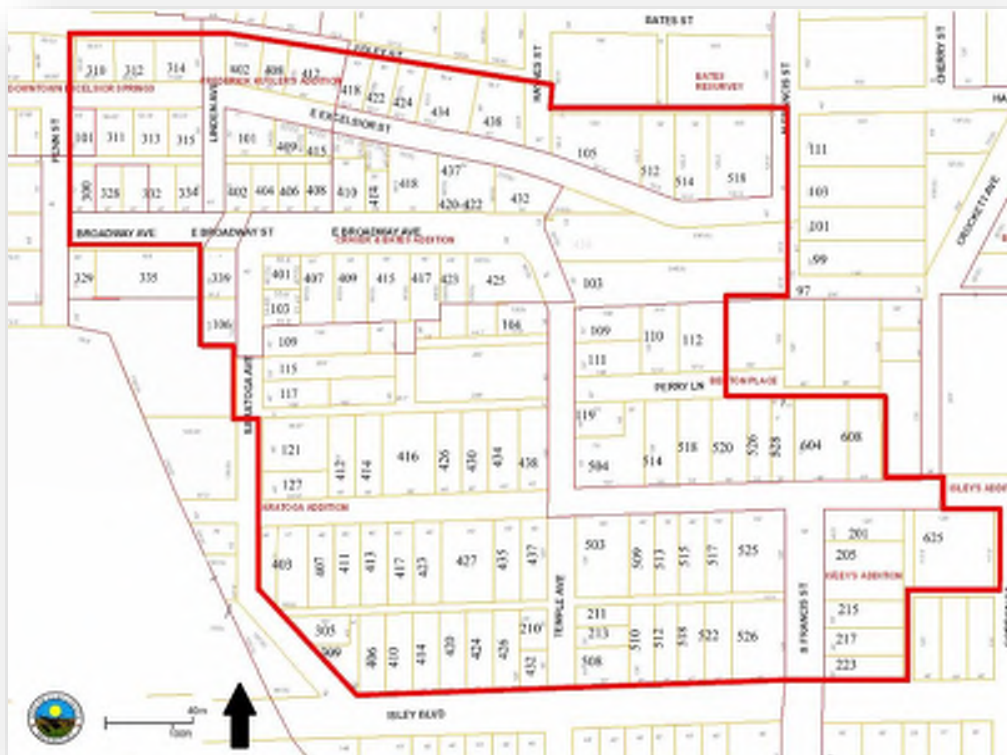
A third public meeting was held on Thursday, March 24 at the Senior Center in order to review the final draft plan. The meeting was attended by residents, City staff, City Council members, members of the Historic Preservation Commission and other interested professionals from the community. After the plan presentation, the discussion centered on the potential and existing incentives offered for renovation and development within the neighborhood. Next steps were identified for the City to meet and prioritize the items identified in this plan, assign tasks for accountability and establish a schedule to complete the tasks.

Brief History and Description of the Boarding House District

Excelsior Springs incorporated in 1881 and became a regional health and recreational destination as early as 1880, when the mineral waters were discovered by a nearby farmer. With this discovery, tourism boomed in the city. Houses and boarding houses were constructed near the springs and the development of the city continued rapidly.

Today, the Boarding House District retains the most intact collection of boarding houses among the surveyed areas of the city. The vernacular residential buildings and mature landscape characteristics add to this setting. The neighborhood has been experiencing new interest in the preservation of the historic resources within its boundaries. This is further fostering the interest in the rehabilitation of the historic structures and increasing the potential for future development within the historic neighborhood.

The Boarding House District is located east of downtown. The district is irregularly shaped and is bounded by Penn and Saratoga Streets on the west, by the north side of Bluff Street and (currently) by Isley Boulevard on the south. The north and northeastern edges of the district are marked by extremely steep and wooded hillsides which serve as natural boundaries. The houses in this area cling to the hillsides with access provided by steep steps. Many of the hillside roads are very narrow and allow passage of one vehicle when residents parallel park along one



Boarding House Historic District – Current Boundary

side of the road. Limestone retaining walls are in poor condition along the north edge of the district. Many of the blocks have gravel alleys to access the rear of the properties.

The Boarding House District contains primarily residential buildings, both single and multi-family structures. There are few commercial and social buildings at the west end of the district, which is the easternmost edge of downtown. Demolition of historic buildings has occurred throughout the district, but is most noticeable in the northwestern quadrant. In other parts of the district, the dense development remains as one of the most distinguishing features of the district. The homes, boarding houses and apartments are constructed on small lots and have very shallow setbacks from the roads. This type of development is reflective of the city's explosive growth after the discovery of the mineral springs. Land in the Fishing River valley was especially valuable, being the closest to the numerous springs and wells which were developed for the burgeoning tourist trade. Today, many of these streets in the district retain their historic pattern of crowded development.

The present condition of the majority of the buildings within the district is closely tied to the demise of the health and medicinal aspect of the mineral waters industry in Excelsior Springs. Combined with the decline of this key economic force in the 1960s was the rise of federal programs for low-income housing. Consequently, many of the buildings have not been maintained over the years. This lack of maintenance has taken a toll on not only the visual appearance of the district as a whole, but has led to deteriorating conditions in many of the individual buildings.

A majority of the buildings in the district are residential (single and multi-family), but other types, such as a historic library, a church, offices and also a dormitory are also located in the district. The structures used as boarding houses tend to be concentrated along Broadway, Temple, Saratoga and Linden Streets. They are comparatively large buildings and generally fill the entire lot with varying heights from one to three stories. Some of these structures have multi-story front porches. The single family houses tend to be one, one-and-one-half story or two story structures in a variety of architectural styles. Most houses have decorative single story front porches.

A majority of the structures were constructed in the late Victorian period, exhibiting a variety of detailing and vernacular types typical of this period. Styles include Queen Anne, Classical Revival, Craftsman and Craftsman bungalows. Many of the buildings have also undergone major renovations through the years.

Building materials throughout the district vary per building type and use, but tend to lend a unified appearance throughout the district. A majority of the structures are frame construction with most having wood or asbestos siding; although other types of siding are present, including aluminum, vinyl and asphalt materials and some synthetic stone. There are also several brick structures.

The district is most unified by the cohesive construction patterns, such as the building setbacks, massing, size and roof types.

*This information on the history of the Boarding House District is taken directly from the *Excelsior Springs, Missouri Historic Resources Survey, Phase II Boarding House District* by Three Gables Preservation, 1994.

Efforts to Date in the District

The Boarding House Local Historic District was established in July 2010 following a recommendation from the 2006 Comprehensive Historic Preservation Plan. Surveys of the historic resources in Excelsior Springs had been an ongoing endeavor since 1991, when the first survey was started. In 2014, the original Boarding House Historic District building survey was updated and design guidelines were created for the District. The District is taking its next step by completing this Preservation Plan, which will be adopted as a component of the City's Comprehensive Historic Preservation Plan. The remaining portion of the neighborhood that is located south of Highway 10 may be surveyed in the coming year. Once that work is accomplished, the district boundaries will be established and the Boarding House Historic District may be able to be placed on the National Register of Historic places.



Boarding House Historic District 2014 Survey Map Identifying Contributing and Non-Contributing Properties.

The integrity of the individual properties within the historic neighborhood were evaluated in the updated 2014 survey, per the National Register Bulletin –*National Register Criteria for Evaluation*. Through this survey, buildings were identified as 'Contributing' or 'Non-Contributing' to the overall historic district. A majority of the neighborhood buildings retain character and are substantially unchanged since the period of significance. They possess historic integrity, add significance to the overall district and are considered to be contributing. Those properties that have been substantially altered or do not share associations with the historic district are

non-contributing. Refer to the 2014 survey map below for properties within the historic survey area that are considered to be Contributing or Non-Contributing.

Benefits of Historic Preservation

Historic preservation is an endeavor that seeks to preserve, conserve and protect buildings, structures, objects and landscapes that are historically or culturally significant. The goal of historic preservation in the Boarding House District is to ensure that historic resources are saved for future generations and are actively being used. To accommodate for continual use, historic preservation allows for appropriate improvements or changes to the resources, as long as character-defining elements are maintained. Historic preservation represents a commitment to remembering the past while also preparing for the future. It provides many benefits that can help create livable, sustainable and economically viable communities.

Cultural

Architecture is a direct and substantial representation of a place's history. By preserving historic structures, current generations are able to share in the very places that past generations once lived and worked. It also allows them to add to the places where future generations can share and learn from the past. It allows building to change as each generation records their own story. Historic preservation is the visual and tangible conservation of a culture's identity and creates a character that is truly unique to the community.

Environmental

On the most basic level, historic preservation is the practice of recycling and conserving resources. Restorations and rehabilitations of historic structures consume less energy than demolition and new construction. It also preserves the existing embodied energy of the structure. Historic buildings were constructed with durable traditional materials such as wood and masonry that are able to be repaired. Historic buildings were often built with many of the sustainability practices that are used today, such as increased daylighting and increased thermal mass.

Economic

In recent years, there has been a great deal of research on the economic benefit of historic preservation and it has revealed that historic preservation is a power tool to sustain local economy, create jobs and generate capital. Included in the studies have been the effect of historic preservation on property values. Those studies have found that properties in historic districts appreciate significantly faster than comparable properties not located in historic districts. The preservation of historic properties can also create heritage tourism in a community. Those resources attract people to the community and living in neighborhoods in order to experience the history and culture of the place.

City's Historic Preservation Vision

As part of the 2010 Historic Preservation and Revitalization Plan, Excelsior Springs created a vision for its preservation. The community's preservation vision was described as the following qualitative statements:

- Historic resources are integral to life in Excelsior Springs - Historic preservation shall become a vital part of the broader community development policies and objectives and it shall become an important tool in economic development, public health, sustainability, housing and cultural enrichment.
- Historic resources convey the humanity of the City – Historic resources connect people to the past and provide opportunities to interpret their history.
- A network of individuals and organizations supports Historic Preservation throughout the community – Historic preservation should link official City preservation efforts with different preservation related groups and activities.
- Historic Preservation is solution oriented – Historic preservation programs helps owners find solutions to stay in and maintain their historic resource.
- Historic Preservation looks forward while valuing the past – The City looks to preserve and respect of their past, but aspires to do so in a way that moves the City toward the future.
- Historic Preservation is “horizontally integrated” in planning efforts – Excelsior Springs would like historic preservation to be integrated into all departments and agencies in the City.
- The City's Historic Preservation program is readily accessible – The City would like their preservation program to be easy to understand and be accessible that lay people and professional can participate in.
- The preservation program provides guidance for treatment of historic resources – The City would like the preservation program to help residents identify and designate their historic resources and create the tools necessary to help them preservation their structures.
- Historic resources are key to the City's sustainability initiatives – By preserving the historic properties in the City, they are conserving the embodied energy of the place and conserving building materials.

City's Vision for the Boarding House Historic District

Through this planning process, the City Council and the Historic Preservation Commission have created a short and long-range vision for the Boarding House Historic District:

- The City of Excelsior Springs views the Boarding House Historic District as the eastern gateway to Downtown. This neighborhood provides visitors the first impression of the historic town.
- The City has dedicated resources to the survey and planning for the preservation of this historic neighborhood and will continue to survey the south portion of the neighborhood with the eventual hopes to establish a larger National Register Historic District.
- The Boarding House Historic District retains its historic character and shows how the City evolved to accommodate a large number of temporary residents who once frequented the local businesses involved with the distribution and partaking of the mineral waters. This neighborhood provides a tangible reminder of the City's historic past and the City desires to protect this vital history and unique sense of place.
- The City hopes to maintain, preserve and encourage appropriate rehabilitation and new development within the Boarding House Historic District. This includes providing incentives for the rehabilitation of existing structures and historically appropriate infill of vacant lots. The Design Guidelines for this neighborhood will help guide the maintenance of existing properties as well as new development.
- The City does not support further demolition of properties within the historic district and is supportive of retaining the existing housing stock. This is a top priority.
- The City looks to increase the public awareness of the value of the Excelsior Springs' historic resources. They would like to create a desire for people to want to live in this district by bringing in new home owners and stakeholders.
- The City looks to provide a better neighborhood presentation, through improvements to its infrastructure, including sidewalks and streets.
- The City desires to re-create healthy neighborhoods for healthy families and increase public safety.
- The City is interested in promoting the appropriate rehabilitation of existing vacant properties to private parties.
- The City would like to encourage local ownership of rental properties and engage landlords in the revitalization process.
- The City is interested in utilizing the current zoning or updating its zoning ordinance to prevent demolition of properties to develop parking lots.
- The City recognizes that planning efforts associated with the Boarding House Historic District are integral with the revitalization efforts of the downtown.

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Executive Summary

Neighborhood Plan Summary

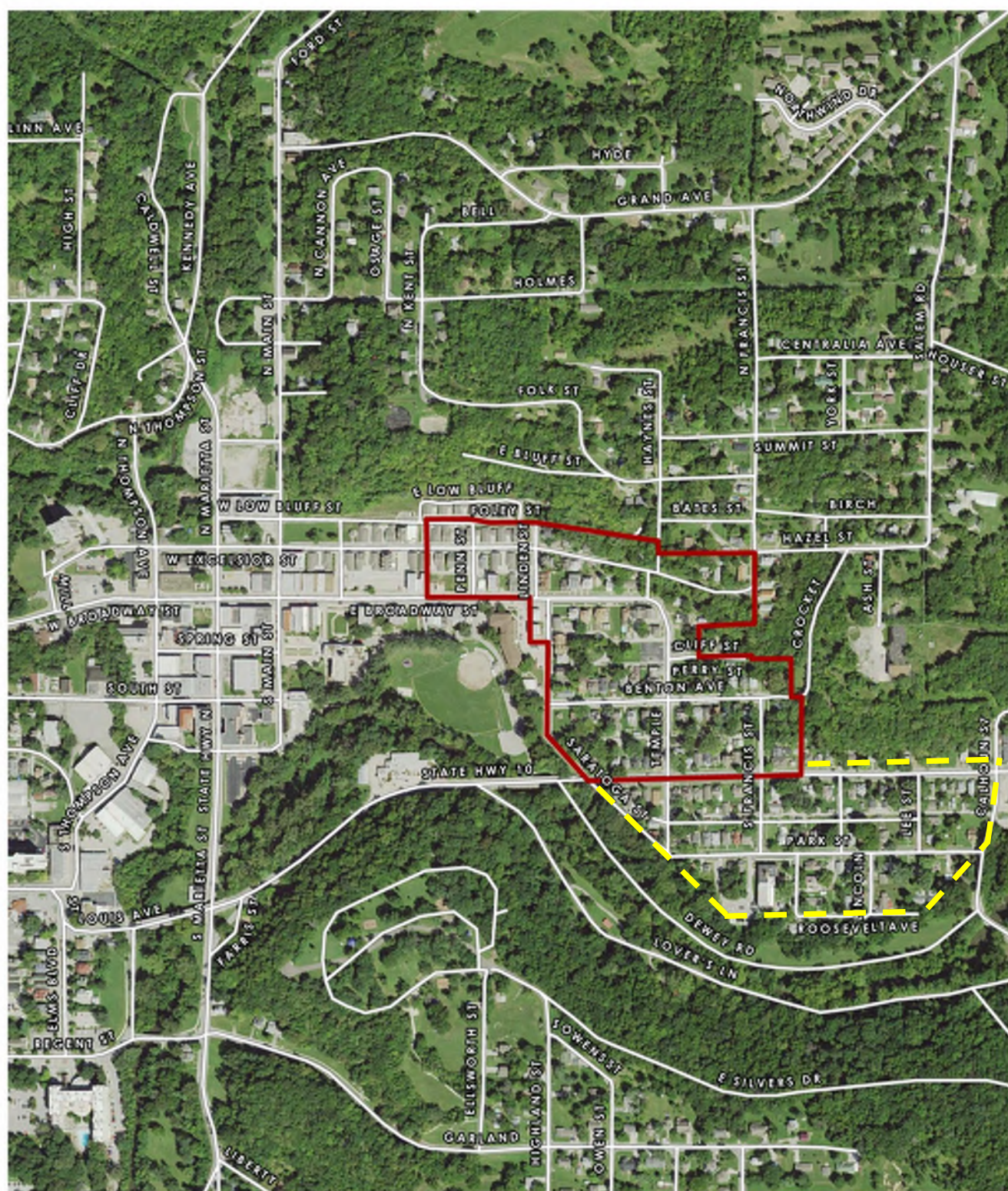
The District is energized and excited to see positive changes happening. The residents and the City want everyone to know that work is underway to begin the revitalization and preservation of this unique neighborhood. The momentum has started and will continue to realize improvements within this district.

The Boarding House Historic District retains a significant amount of historic integrity and has an enormous amount of potential for revitalization, preservation and sensitive and appropriate new development. The most significant hurdles include limited financial resources for the rehabilitation of existing owner-occupied properties, as well as the large amount of vacant houses and lots that are available for renovation and redevelopment. Marketing these available properties is of the utmost importance.

The residents collectively identified priorities for their neighborhood preservation, which include items that should be accomplished at the City level and others that can be done at the neighborhood level. The neighborhood has begun to organize and communicate with each other, through the recent development of a Facebook page, with the hope that they can plan upcoming events and clean-ups.

Tangible and intangible incentives have been identified that would assist existing residents and potential new home owners or investors to renovate existing and unoccupied properties. A top priority is to apply for a second grant from the Missouri State Historic Preservation Office to continue the historic survey of the District to include the south section of the neighborhood between Isley Boulevard and the river. Once this survey is accomplished, the district could be listed on the National Register of Historic Places, which will give the neighborhood further incentives and development tools, such as the ability to apply for federal and state historic rehabilitation tax credits.

The next steps for the City would be to adopt this Boarding House Historic District Neighborhood Preservation Plan as an appendix to the City's Comprehensive Plan. The City should coordinate a strategic planning session to prioritize and assign critical planning items identified in the Matrices on pages 47-50 of this report, with accountability, approach and a projected time line for completion for each item. Frequent communication with the neighborhood about the progress of these items is desired by the residents and is critical to gauging the success and demonstrate that the momentum for the preservation of this neighborhood is active.



City of Excelsior Springs, MO



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Neighborhood Assessment

Neighborhood Assessment Workshop

The Neighborhood Assessment Workshop was an open public meeting in which members of the neighborhood identified assets, issues and needs in their neighborhood. This workshop was an opportunity for residents to look at the connections among places where they live, work and socialize. The participants engaged in a neighborhood mapping exercise, and discussed challenges and barriers facing their neighborhood. They also identified the assets in their neighborhood and voted on the priorities they have for their neighborhood.



Neighborhood Assessment Steps included:

- Step 1: My Neighborhood Is...
- Step 2: If I Could Fix One Thing...
- Step 3: My Neighborhood Assets Are...
- Step 4: Where We Go From Here...
- Step 5: My Neighborhood Capacity Is...





Step 1: My Neighborhood Is...

In the Neighborhood Assessment Workshop, Boarding House District residents identified how they “experience” the neighborhood through a mapping exercise. They identified those things they want to protect, preserve, or enhance in the neighborhood by thinking about the landmarks, paths, activity centers, areas, and places.

For each step of the workshop, several teams mentioned the same item more than once. These items have been noted with an * next to them.

Landmarks

significant physical objects

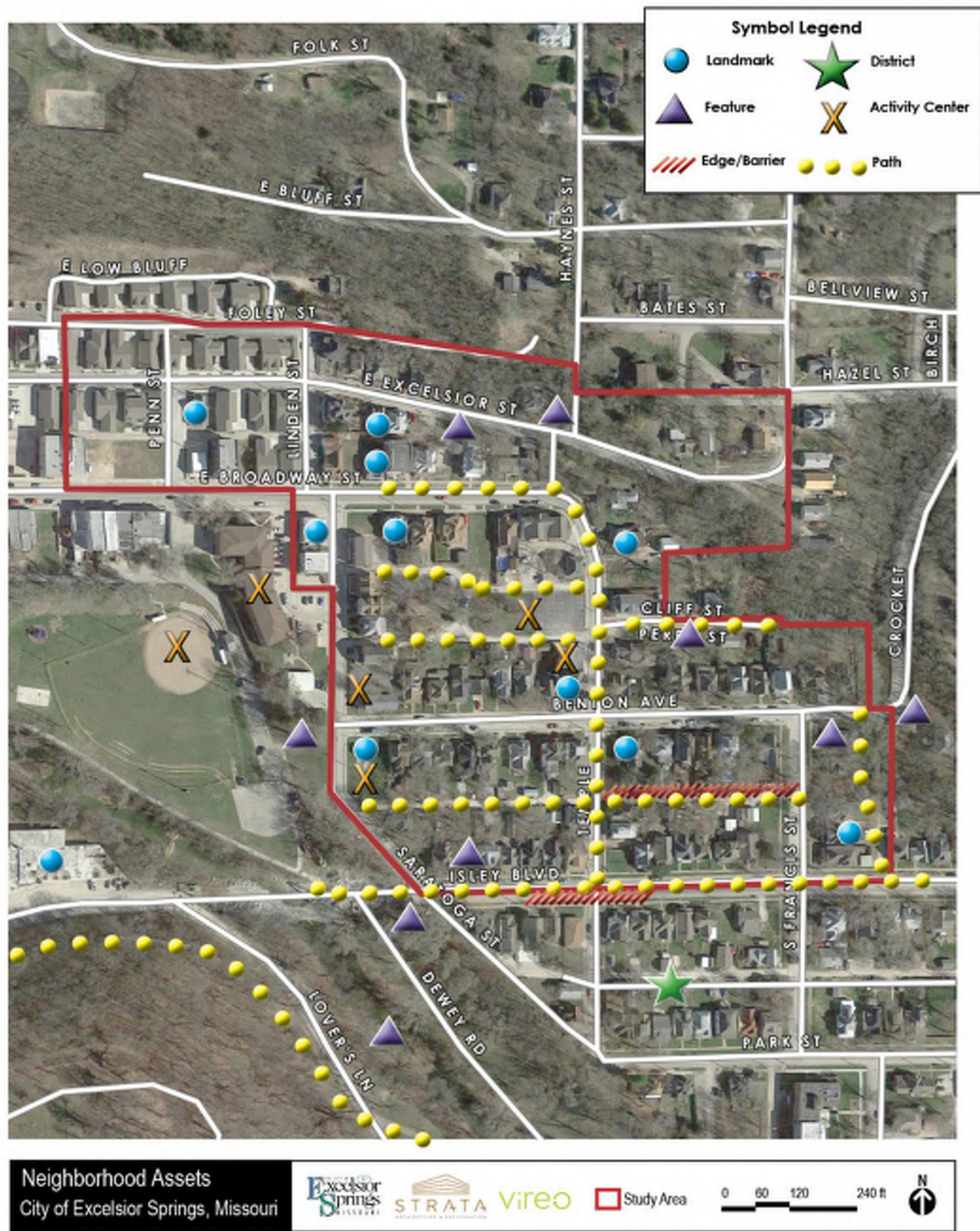
- Steep hill and cars*
- Gazebo*
- Siloam Church*
- Old Library*
- Betty’s House
- Pepsi Building*
- Yards*
- Swastika House
- Well Sites (6-7)*
- Human Impact on Creek



Siloam Church



Old Library



Paths

routes to get places

- Alleys*
- Alley behind S. Francis and Isley*
- Stairs and Sidewalks*
- Isley School Steps*
- Lovers Lane (connecting steps)*
- Connect to Lover's Lane & Ballpark*
- Access / Steps from Saratoga to park and trail*
- Bad Intersection at Benton & Temple
- Walking Trail*
- Neighborhood access to walking trail and Isley, Park / Wood*



Activity Centers

gathering places

- Piburn Field (park and playground)*
- Siloam Baptist Church Park*
- Crystal Lithia Well & Park*



Districts

areas of recognizable character

- Historic Staircases*
- Woods*
- Gazebo*
- Siloam Mountain*
- New Bridges*
- Church*
- Retaining Walls – landmarks and edge/barrier*
- Historic Trees
- Amend Neighborhood Boundary – add south side of Isley to Park Street.



Woods

Edges or Barriers

limits area enjoyment

- **Permitting***
- **Property Maintenance*** (Isley between temple and S. Francis, and Broadway)
- **Alley Ways*** (alley between Temple & S. Francis)
- **Sidewalks*** (Isley)
- **Steps** (down to walking trail by bridge)* Saratoga down to Piburn Park)*
- **Property Maintenance-balanced with preservation values***
- **Trashy Image & Pride***
- **Barrier to Park**
- **Visual Barriers** (Items in side yards, front yards being the first thing you see that obstruct the houses and green spaces/yards)
- **Signage** (speed limit, crosswalk and getting the word out)*
- **Retaining Walls** (landmarks & edge barrier*)
- **Trim Trees in power lines**
- **Homeless camp east of Crocket Street**



Features

things to preserve

- **Stairs/Steps/Stonework*** (Haynes Street, Crocket Street)
- **Traffic Flow/One-way Streets***
 - Link to Downtown
 - Alley - Benton & Isley is now 1-way
- **Save Tree at Isley and Saratoga**
- **Natural area along Lover's Lane and Dewey Road**
- **Stonewall south of Crocket.**
- **Hall of Waters**





Step 2: If I Could Fix One Thing...

In every neighborhood, there are things that need to be changed. These things stop residents from enjoying their neighborhood and from doing the activities that they want to do.

Below is the list of “**fixes**” or “**one thing**” that workshop participants said they would like to see changed in the Boarding House District Neighborhood.

For each step of the workshop, several teams mentioned the same item more than once. These items have been noted with an * next to them.

If I Could Fix One Thing

things that need to be changed

<u>Streets & Traffic</u>	<u>Neighborhood Preservation</u>
<ul style="list-style-type: none"> • Alleyway between Benton and Isley should become 2-way.* • Large truck traffic* • Speed limits. • Fix One-way Streets • Redirect flow of traffic* (Broadway to Temple and into Downtown) • Implement one-side street parking.* • Need crosswalks at Temple, Broadway, and Isley. • Sidewalks* (ADA issues at sidewalks and cost to replace them).* 	<ul style="list-style-type: none"> • Take Responsibility for Own Property and Neighborhood • Help Neighbors* • Create Local Incentives* • Real Estate / Education* • Homeowners willing to make repairs but need \$ help and open dialogue about phasing work over a time (months/years) • Which organizations are available to help homeowners cope with code enforcement repairs? • Make homes more attractive to 1st time homebuyers* • Address vacant properties effectively. • Area redevelopment • Get rid/keep out delinquent landlords* • Notification of for sale of vacant and/city owned property.

Landmarks Commission

- Consistently apply design guidelines.
- Adding Administrative Review to shorten process.
- Amend neighborhood boundary to the south.
- Permitting processing and amount of fees*

Quality of Life

- Need shelter for Homeless in the woods and in the empty houses.*
- The Gazebo could become a City park- it could be more enhanced.*
- More places for kids to play.*
- Fix the perception that the neighborhood is unsafe and high crime (patrol area more/neighborhood watch).*
- Poor water pressure.*

Neighborhood Organization

- Organize & Communicate*
- Get to know neighbors.
- Homeowner Group.
- Neighborhood Watch.
- Presence of local elected official within neighborhood.





Step 3: My Neighborhood Assets Are...

Participants identified assets that add value to the neighborhood. The assets include places, features, buildings, groups, organizations, clubs, equipment, skills, knowledge, resources, funding, and any other thing that adds value to the neighborhood.

For each step of the workshop, several teams mentioned the same item more than once. These items have been noted with an * next to them.

Groups, Clubs, Organizations

organizations that add value to the neighborhood

- Churches*
- Social Service Agencies*
- Boy Scouts*
- Habitat for Humanity*
- Good Samaritan Center*
- Masons, American Legion, VFW, Elks, IOOF Odd Fellows*
- Division of Youth Services
- Library
- Local News Paper Editor
- Downtown Excelsior Springs Partnership(DEP)
- Volunteers*
- Downtown Excelsior springs Parks Department

Places, Features, Buildings

locations that add value to the neighborhood

- Churches* (activities and food pantry)
- Dari-B



Skills, Equipment, Knowledge

abilities & tools that add value to the neighborhood

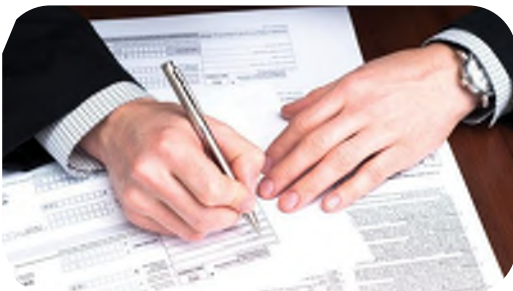
- Community Service at local High School*
- Job Corps
- Community Neighborhood Meetings*
- Landscapers and Artists*
- History
- Prayer
- Community/Neighborhood Meetings
- Neighborhood Cleanup day
- Help to the Homeless*
- Vo-Tech Student Housing Constructions
- Stone Mason (Steve Jewell)*
- City Councilwoman (Sonya)*
- Rehab Expertise
- Historians
- Christmas in October
- Photographers
- List People and their Talents
- Temporary housing for Homeless*



Resources & Funding

financial assets that add value to the neighborhood

- Clay County Senior Tax
- Division of Youth Services at Watkins Mill
- USDA Rural Development Fund, Dept. of Agriculture
- DEP (Downtown Excelsior Springs Partnership)
- Funding for home improvements by those with limited funding.*



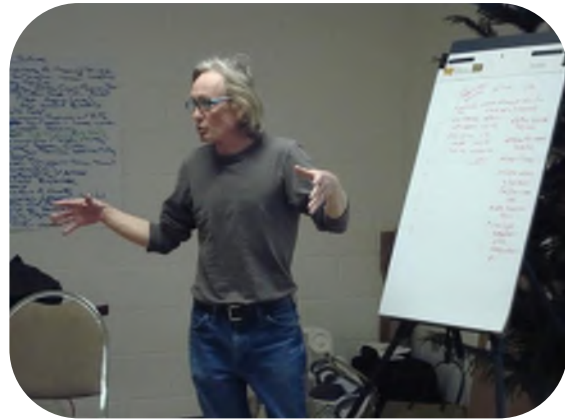


Step 4: Where We Go From Here...

In this step, participants identified **specific actions** the neighborhood can take to address the issues and challenges identified earlier in the Workshop. They brainstormed ideas for the following three categories:

- **Things We Can Do**
- **Things The City Should Do**
- **Things We Can Do With A Partner**

The following three tables represent the collective group results totaling 21 actions. In this step, these actions are non-prioritized.



Non-Prioritized Actions Things WE Can Do

<i>actions</i>	<i>neighborhood role</i>
1. Red Tape / Preservation Commission and Codes*	Communicate*
2. Water Pressure*	Communicate, Calls, Stay on city to make sure it is done
3. Homeless Shelter*	Neighbor Visits
4. Drug Houses/Teens*	-
5. City Enforcement Consistency*	Communication, Calls Positive
6. Speeding*	Communication
7. Absentee [Landlords] Rentals / Lack of Maintenance, Increase Home Ownership*	Communication
8. Neighborhood Clean-up*	Neighborhood Clean-up* Keep garbage clean, trim trees/shrubs, neighborhood dumpster day
9. Traffic Signage/Flow (Sidewalks/Streets/ADA)*	Communication
10. City Neighborhood Perception	-
11. Organize Neighborhood Block Captains	-
12. Sidewalks*	-
13. Communication*	Neighborhood contact list and talents, Keep in contact*
14. Children Areas*	Help build, use vacant lots for play*
15. Sale of City Empty Lots*	Requesting info about sales, tell city to sell some of their lots they own now
16. Crime Prevention*	Neighborhood watch / volunteer, contact police*
17. Signage*	Trim bushes / clean up lots, contact police / public works
18. Make Homes More Attractive*	Use your current residents knowledge - Help Each Other, contact list
19. Park Steps to Park (Piburn)*	Make Request to Park and Recreation Board [Step 2]
20. Research	-
21. Planning	-

Non-Prioritized Actions Things The CITY Can Do

<i>actions</i>	<i>City role</i>
1. Red Tape / Preservation Commission and Codes*	Red Tape Issues - Change Time (Saturday Meetings)*
2. Water Pressure*	Repair, Post construction concerns and \$\$
3. Homeless Shelter*	-
4. Drug Houses/Teens*	Police Patrol*
5. City Enforcement Consistency*	-
6. Speeding*	-
7. Absentee [Landlords] Rentals / Lack of Maintenance, Increase Home Ownership*	-
8. Neighborhood Clean-up*	Heavy Item Pick-up City yard waste (annual) pickup, City works has a collection site for yard waste and furniture
9. Traffic Signage/Flow (Sidewalks/Streets/ADA)*	-
10. City Neighborhood Perception	Historic Comm.
11. Organize Neighborhood Block Captains	-
12. Sidewalks*	Sidewalks*
13. Communication*	City contact with city officials and <u>who</u> to talk to, Consistency and Transparency, Consistency of requirements and follow-through
14. Children Areas*	Help build play and plan for play spaces
15. Sale of City Empty Lots*	Notification and bid requirements
16. Crime Prevention*	Police appearance and prevention, Police liaison to neighborhood
17. Signage*	Tree maintenance - Police/Public Works, Look at one way streets and directions*
18. Make Homes More Attractive*	Follow the same rules as home owners
19. Park Steps to Park (Piburn)*	Decision Making [Step 3]
20. Research	-
21. Planning	-

Non-Prioritized Actions Things We Can Do With A Partner

<i>actions</i>	<i>Partner role</i>
1. Red Tape / Preservation Commission and Codes*	Communicate, Calls
2. Water Pressure*	-
3. Homeless Shelter*	Tri-County, Good Samaritan Center, Police, Churches
4. Drug Houses/Teens*	Comm. Center, Churches, School District, teen challenge*
5. City Enforcement Consistency*	Comments
6. Speeding*	State (MODOT), County
7. Absentee [Landlords] Rentals / Lack of Maintenance, Increase Home Ownership*	Incentive Programs
8. Neighborhood Clean-up*	Civic Organizations Research who, when, how much, etc.*
9. Traffic Signage/Flow (Sidewalks/Streets/ADA)*	-
10. City Neighborhood Perception	Newspaper, City, Real Estate Agents, DEP, Chamber*
11. Organize Neighborhood Block Captains	-
12. Sidewalks*	-
13. Communication*	Homeowners / business / city buildings should be consistent (requirements)
14. Children Areas*	Research - HS Community Service Project, Job Corps, Sister Cities program, Boy scouts*
15. Sale of City Empty Lots*	Research - HS Community Service Project, Job Corps, Sister Cities program, Boy scouts*
16. Crime Prevention*	-
17. Signage*	-
18. Make Homes More Attractive*	Rebuilding together in Clay County, 'Christmas in October', Need to know the requirements of the programs when applying and need to know fees
19. Park Steps to Park (Piburn)*	City Council - inform 1st [Step 1], Work with local business (name on steps like brick at Hall of waters)
20. Research	-
21. Planning	-

Prioritizing Specific Actions

To gain a sense of priority, all participants prioritized actions through a dot exercise. Following open discussion, each group identified their top action steps for prioritization, expanding the consolidated list of 21 actions, shown in Step 3, to 41 actions, for prioritization. Some of the 41 actions are redundant.

During the exercise, the Neighborhood assigned priority for each action step without regard for the timeframe within which the recommendation can realistically be accomplished and without concern for whether funding sources can practically be identified. For example, it is possible that a “high” priority item may not be realized for many years. In contrast, some “low” priority items could potentially be accomplished in a relatively short amount of time without significant expense due to an unforeseen opportunity.

Each participant was provided a total of 6 dots. They were asked to identify their top 3 priorities under each of the following three categories:

- **Things We Can Do**
- **Things We Can Do With A Partner**
- **Things The City Should Do**

Results follow.



Collective Voting for Priority Actions

Things We can do	Things we can do with a partner	Things the City can do
Clean-up Trash and Junk ***** (5)	Clean-up Trash and Junk ***** (5)	Clean-up Trash and Junk
Maintain Own Home ***** (5)	Community Outreach – Children, Parents, Homeless, Druggies (shelter/food) ***** (6)	Fix Sidewalks (in front of street/houses) ***** (6)
Research for Self-Enabling * (1)	Fix-up Run-Down Homes ***** (15)	Trim Trees (overgrowth)
Community Outreach – Children, Parents, Homeless, Druggies (shelter/food) ***** (6)	Improve Police Relations – Presence, Patrol and Prevention, Community Contact Person ***** (7)	Fix Alleyways (regrade, fix potholes, gravel) * (1)
Fix up Rundown Homes	Educate Realtors ***** (7)	Crowded Alleyways & Streets (Parking)
Set up means of communication = an organization (work, social) ***** (8)	Improve City & Historic Preservation Commission Relations **** (4)	Steps and Access to Parks and Walking Trails * (1)
Improve City & Historic Preservation Commission Relations *** (3)	Children’s Areas **** (4)	Speeding through town (Police Radar, Signage) ** (2)
Children’s Areas **** (4)	Make Homes More Attractive ***** (5)	Improve Police Relations – Presence, Patrol and Prevention, Community Contact Person ** (2)
Maintain Vegetation and Trash at Signage *** (3)		Have meetings with the City and Neighborhood – Improve participation and communication (City & HPC) *** (3)
Work with City on Water Pressure * (1)		Program for fixing up properties ***** (9)
Volunteer Neighborhood Watch *** (3)		Program for vacant properties ***** (7)
Improve City Department Communication ***** (14)		Making all Alleys 2 way
		Water Pressure Issues
		Zoning Change – Residential / Light Commercial, Live/Work Opportunities * (1)
		One Way Streets and Traffic Flow **** (4)
		Signage – New, visibility, replacements, maintenance
		Children’s Areas * (1)
		Make Neighborhood More Attractive * (1)
		Red Tape – Communication, Regulations, Consistency ***** (12)
		Homeless/Transitional Housing **** (4)
		Absentee Landlords **** (4)

Intentionally Left Black



Step 5: My Neighborhood Capacity Is...

Assessing neighborhood organizational capacity, or Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis, is a way to analyze and evaluate the current neighborhood organizational situation and environment. It can be used to help the Boarding House District Neighborhood identify goals that will give them the most benefit in specific projects or programs. It is a way of matching neighborhood internal capabilities, resources, and liabilities with the external factors they are facing.

Neighborhood Strengths

Participants started by identifying neighborhood strengths, which represent internal capabilities and resources, such as:

- What skills, talents, or abilities do you possess?
- What resources do you have at your disposal?
- What specialized knowledge/expertise do you have access to?
- What is already working well?

Neighborhood Strengths

represents internal capabilities and resources

Resources (things)

- **Newspaper**
- **Siloam Church - Cantrell**
- **Online Resources** (City ordinances, codes, HPC documents and Guides)

Specialized Knowledge

- **Council Rep (in neighborhood and at community meetings)***
- **HPC Representative***
- **City Council***
- **Public Works - Chad**

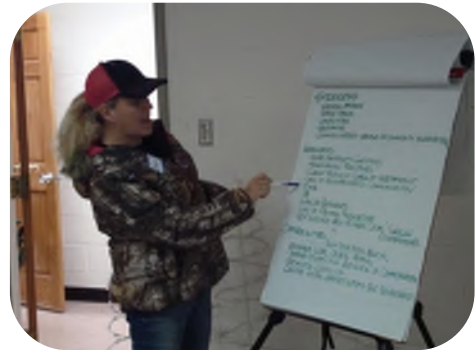
Skills, Talents or Abilities

- **Communicators – Sense of Community Block by Block**
- **Commitment to the neighborhood and getting things done – participation.**
- **Have common agenda and goals**
- **Pool of talent to draw from** (walks of life, age and skills)
- **Communication**
- **Self-improvement and motivation***
- **Concern for Neighbors***
- **People (ourselves)***
- **Stone Mason (Steve Jewell)***
- **Landscaper**

Neighborhood Weaknesses

Next, participants identified neighborhood weaknesses, which represent internal liabilities, such as:

- What are your main liabilities?
- What skills, talents, or abilities do you lack?
- What resources (money, time, help) do you lack?
- What knowledge do you lack?



Neighborhood Weaknesses

represent internal liabilities

Internal Liabilities

- | | |
|--|--|
| • Time* | • Vacancies* |
| • Not following Through | • Neighborhood Appearance |
| • Not Listening | • Some Property Conditions* |
| • City Preservation Commission & Codes | • Transients/Renters* |
| • Slum Landlords/Absentee Landlords* | • Cheap Housing = Lack of Investment* |
| • Lack of Neighborhood Communication* | • Vacant/neglected properties* |
| • Red tape, permits and fees | • Better Communication (timely, responsive, under informed, misinformed) |
| • Lack of Organization | |

Needed Skills, Knowledge, Abilities

- Lack of Rehab Knowledge
- How to hire local skills/contractors
- Knowledge of who to partner with*

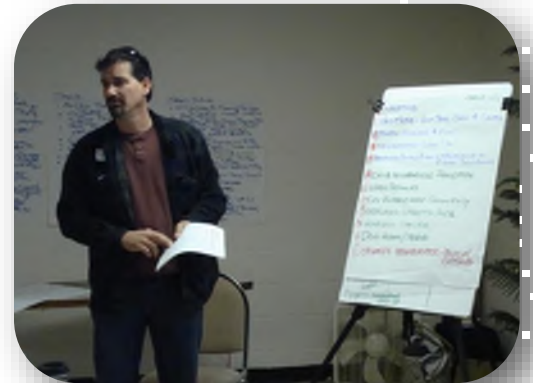
Needed Resources

- Money/Funding
- Outside Partners
- Realtors Marketing Investment Opportunities
- Light Poles/Power Poles
- Legal Enforcement
- Lack of Resources*
- Financing for Improvements*
- Online Resources (internet & notification)

Neighborhood Opportunities

Neighborhood strengths and weaknesses provided an idea of neighborhood internal capabilities, resources, and liabilities. The next step was to identify neighborhood external opportunities for change, growth, and improvement. Such as:

- What one thing could you do that would significantly improve organization?
- What important goals could you pursue?
- How can you take advantage of your strengths?
- What opportunities would become available if you eliminate some of your weaknesses?



Neighborhood Opportunities

ways to change, grow and improve

<u>Organization/Goals</u>	<u>Resources/Tasks</u>
<ul style="list-style-type: none"> • Begin Communication* (quarterly meeting) • Encouraging Neighbors • Outreach* • Continuing to make time to do things • Speak out • Engage local council person (improve communication) 	<ul style="list-style-type: none"> • Put together book* • Organize Cleanup • Create social opportunities for neighborhood • Facebook page • Marketing Plan for Homes for Sale • Encourage home ownership • Email • Market property an SFO • Identify/Map Owner Occupied vs. Rental vs. Vacant properties (Parcel numbers, lot lines, addresses) • Neighborhood contact list • One Pager to hang on doors (workshop results)

Neighborhood Threats

Finally, residents identified neighborhood threats, which represent external events, environmental factors, or changes that could negatively affect the neighborhood. Such as:

- What are the serious risks you are facing if you don't change course?
- What obstacles are impeding your progress?
- What factors are affecting you negatively?
- What current changes or circumstance could affect you negatively?

Neighborhood Threats

external events, environmental factors, or changes

- | | |
|--|--|
| • Traffic* | • Economic Impact |
| • Drugs, Drug Houses, Meth, Alcohol* | • Economic Property Values* |
| • Children Safety | • City Red Tape and fees |
| • Theft, Crime Prevention* (police presence, evidence reporting, reports) | • If we don't get going things will continue to deteriorate |
| | • Realtor Information & Education about neighborhood |



Boarding House Historic District Preservation Strategies

The following are strategies to improve the Boarding House District Neighborhood resulting from the planning process. These strategies serve as a “framework” or “guide” for directing Plan actions that are necessary to resolve neighborhood issues and needs. The intent of the strategies is to stay simple, allowing users to obtain a “big picture” reference point.

Each strategy relates to a specific issue or need, and includes recommended “action steps” for addressing those concerns. For more background, information on these strategies, along with a list of various neighborhood partners, and city responsibilities for implementing each action step, see Steps 1 - 5 presented in this plan.

Successful implementation of this Action Plan will be the responsibility of many neighborhood individuals, partners and the city over many years. It includes key actions and does not make an attempt to document all actions or recommendations that might be undertaken to implement each strategy. This Plan is a starting point.

Things The City Can Do:

Like any city, historic resources are located in neighborhoods that are healthy, but may be experiencing some decline. The continued viability of these neighborhoods, like the Boarding House Historic District, has been demonstrated in the major reinvestment and rehabilitation of areas throughout Excelsior Springs.

Among the key issues that must be addressed are:

- Momentum for continual improvement and private reinvestment;
- Protection from development encroachment and unwanted land uses;
- Proactive strategy for dealing with vacant buildings and property upkeep;
- Home repairs some cannot afford;
- Implementation of aggressive marketing strategies;
- And reinvestment in public infrastructure.

■ Identify Neighborhood Best Practices.

Investigate and think through neighborhood strategies, identify specific tools to carry out those strategies, and learn about communities elsewhere that have used those tools, to improve the land, buildings, neighborhoods and other areas that make up a community built environment.

Recommended City Action Steps:

- City of Gladstone, Missouri, Community Development Department <http://www.gladstone.mo.us/CommunityDev/Neighborhoods/>
- Center for Community Progress. <http://www.communityprogress.net/the-help-you-need-pages-7.php>
- Greater Ohio. <http://www.greaterohio.org/publications/best-practices-for-community-revitalization-stabilization>
- LISC Institute for Comprehensive Community Development. <http://www.instituteccd.org/resources/index.html>

■ Return Abandoned Buildings And Vacant Lots To A Position Of Use

Participants want to improve the single-family residential character of their neighborhood. They felt assertive actions taken to address abandoned buildings would reduce crime and dispel the sense of decline and disregard in the neighborhood. Such improvements will stabilize housing values.

Recommended City Action Steps:

- Design and implement a **Resources Clearinghouse**
 - The clearinghouse will provide a mechanism to get useful and important preservation information to the neighborhood in an understandable and timely manner; to provide a mechanism to get information from the neighborhood about City activities etc.; and to enable residents to share information with one another regarding their activities, problems, and successes.
 - Develop a directory to network and build relationships
 - Hold forums to enhance existing lines of communication
 - Share news from individuals and groups in other industries and related disciplines who participate in preservation
 - Identify the information to be disseminated and methods

- Provide a menu of “**handholding services**” for the neighborhood.
 - Technical assistant, rehab assistance, and/or create a technical assistance swat team
 - Establish a link to qualified contractors and funding
 - Workshops, seminars, and other “hands-on” activities to teach proper preservation and conservation techniques
 - Training and certification programs for “lost arts” of the building trades
 - Information and training programs for professionals involved in development and land use programs. This would include planning and development staffs, investors, lenders, architects, engineers, and design professionals.
- Develop a neighborhood “**tool kit**”
 - Post the wealth of national, state and local preservation technical information
 - "User-friendly" technical rehabilitation information

■ Develop A Marketing Program To Encourage Use Of Neighborhood Properties.

Promoting the value and richness of the Boarding House District is a significant part of ensuring a sustained future. Unfortunately, old perceptions of the neighborhood are many times influenced by the media and the real estate community and even the neighborhoods own residents and neighbors. Actions can range from training, distributing positive literature, advertising and community-wide activities that have broad, positive coverage and appeal to a wide cross section of residents.

Recommended City Action Steps:

- Develop a local **media strategy** through partnerships between the neighborhood and small, local publications. Alternative and neighborhood newspapers and magazines often have readership that is more committed and sensitive to neighborhood level issues and perspectives.
 - Listing of **available properties** for lease or sale.
 - Listing of **vacant historic properties** available for redevelopment by the City
 - **Training** real estate professionals on marketing neighborhood properties.

■ Apply City Comprehensive Plan Housing Strategies

As outlined in the Comprehensive Plan, “Excelsior Springs should institute measures to repair existing housing units in poor and fair condition and carry out programs to protect existing good housing stock. Neighborhood conservation strategies could be a joint effort between the city and a CHDO.” These strategies follow.

Recommended City Action Steps:

- **Rehabilitation.** Excelsior Springs should develop rehabilitation programs (including the use of private loans leveraged by Community Development Block Grant and HOME funds) to promote the stabilization of housing stock that is in need of significant rehabilitation.
 - These programs should emphasize the leveraging of private funds to extend the use of scarce public resources. In addition to conventional rehabilitation programs, Excelsior Springs should promote the use of programs, which help to convert existing rental housing stock to owner-occupancy. These programs include the FHA 203(K) program, an FHA mortgage insurance program, which combines loans for purchase and rehabilitation of property into a single, unified loan.
 - In addition to conventional rehabilitation programs, Excelsior Springs should promote the use of programs, which help to convert existing rental housing stock to owner-occupancy. These programs include the FHA 203(K) program, an FHA mortgage insurance program, which combines loans for purchase and rehabilitation of property into a single, unified loan.
- **Purchase and Resale.** The City's CHDO/CDC would purchase and rehabilitate suitable houses for resale to new owners. The CHDO and/or private lenders finance the acquisition and rehabilitation, with a take-out on the interim financing funded as the FHA or conventional mortgage. Houses are marketed through the normal real estate sales process, or by the development group. A purchase and resale program can be combined with an effort to build affordable housing for seniors.
- **Infill Development.** Several open lots may provide good opportunities for residential development. A Housing Partnership can be helpful in packaging and financing appropriate projects on these sites.

■ Establish Measures to Repair Existing Housing Units.

As identified in the City Historic Preservation and Revitalization Plan, the offering by the City of some special benefits to stimulate investment in historic properties encourages property owners to follow appropriate rehabilitation procedures, and even assists those with limited budgets. This may include financial assistance, tax breaks, technical assistance, or regulatory relief such as streamlined review processes and special flexibility in building codes.

Recommended City Action Steps:

- Promote expanded use of **existing incentive programs**.
 - Continue publishing materials about the existing tax incentives. The existing tax credits programs offered at the state and federal levels have been essential to recent rehabilitation projects.
 - Facilitate use of the existing tax incentives programs.
 - Provide technical assistance to help property owners make use of the tax credits.
- Promote development of **new incentive programs**.
 - Study the feasibility of initiating local tax incentives for rehabilitation of housing in historic properties.
 - Consider how this tool may help to promote home ownership as well. For example, a sales tax rebate on construction materials purchased in town may be used.
 - List the Boarding House Historic District on the National Register of Historic Places in order to give residents the ability to utilize federal and state historic rehabilitation tax credits.
 - Establish a **Revolving Loan Program** for historic property owners. A revolving loan program makes low-interest loans available to property owners for rehabilitation projects. Initial funds come from grants, donations, and City allocations. Qualifying projects receive loan assistance. The loans are repaid, thus replenishing the fund.
 - A Revolving Loan fund already exists in the Hall of Waters Historic District, and this model could be extended to other areas or property types.
 - Neighborhood Housing Services also has experience in revolving loan funds, and could be a partner in this effort.
- Facilitate acquisition of **property** insurance for historic properties by their owners. Review and provide a link on the City's website to materials provided on the National Trust for Historic Preservation's website on historic property insurance.

- Study the feasibility of adopting a special half-cent **sales tax to assist in funding preservation programs**. As a part of a strategy for the sales tax, a marketing plan should be prepared.

■ **Compel Absentee Landlords to be Responsive and Responsible**

Though a great percentage of the neighborhood is single family dwellings, participants identified the need for accountability from landlords. The City wants to work with those who own property in their neighborhood to encourage landlords to take better care of their property.

Recommended City Action Steps:

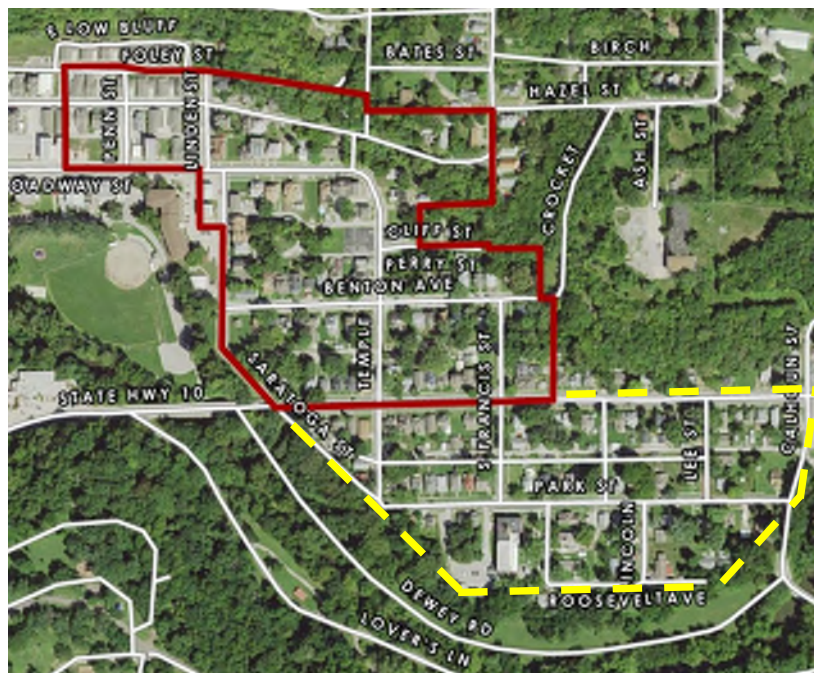
- Identify ways to **encourage landlords** in both single-family and multi-family dwellings to take better care of their property.
 - Encourage landlords to attend city meetings in order to improve understanding of property maintenance standards.
 - Share **knowledge of skills and resources** available to landlords to address property maintenance issues.
 - Create incentives for **landlords** who do a good job in maintaining their property (like tax breaks or priority access to services).
- Create a **Landlord Training Program** that educates and informs those who own rental properties.
 - Involve landlords in educating international residents about the norms of U.S. culture pertaining to trash and property maintenance
- The **Residential Occupancy Inspection Ordinance** does not require that existing dwelling units be brought up to present new construction Building Code standards, rather the inspection checks for health and safety measures and sanitation.
 - **Investigate best practices** to identify specific tools to carry out strategies, and learn about communities elsewhere that have used tools, to improve the land, buildings, neighborhoods and other areas that make up a city's built environment.
- Establish a **volunteer call-in program** to identify problem properties for Codes Officer so that they understand the residents' concerns.

■ Complete the Historic Resources Survey and Potential National Register of Historic Places Historic District Nomination.

Resource identification and nomination should be completed by the City in a manner that facilitates neighborhood conservation.

Recommended City Action Steps:

- Complete the [History Survey](#) of the Boarding House neighborhood to the south of Isley Boulevard (State Highway 10) at outlined in yellow below, and then proceed with an appropriate level of [designation](#) for these resources.



■ Preserve Urban Design and Neighborhood Character

The current zoning of the neighborhood allows multi-family. A majority of the neighborhood is single-family. But in some locations, with the appropriate design, the historic development pattern of multi-family may remain appropriate for the neighborhood. The neighborhood may choose to investigate creation of a zoning overlay in effort to exclude inappropriate development from occurring in the neighborhood, and to codify the recently approved Boarding House Historic District Design Guidelines.

Recommended City Action Steps:

- Currently, the **Boarding House Historic District Design Guidelines** provide guidance. It is only when a Certificate of Appropriateness is required, a rezoning is required, incentives are requested, a plan is required or variances are sought that staff and/or stakeholders have the opportunity to enforce these guidelines.
 - There are two ways to require conformance with the design guidelines:
 - amending the development code or
 - adopting a zoning overlay district.
 - For the guidelines that are fundamental, quantifiable, it may be feasible to amend the Landmarks Ordinance by adding those guidelines directly into the Ordinance.
- Where the existing zoning or development pattern **allows a greater intensity, number of units, or bulk** than is currently desired in the neighborhood, establishing a **zoning overlay district** is another option that can refine the base zoning district requirements.
 - There are various types of overlay districts and various ways to administer a zoning overlay. Each can be tailored to best meet the needs of the neighborhood.
 - Overlay zoning districts are adopted as a means of addressing specific aspects of land use control or development design that transcend base zoning district provisions. As the name implies, overlay districts “over-lay” applicable base district classification to alter some or all of the zoning regulations that apply to particular sites.
 - The purpose of overlay districts is to allow the city to establish special land use regulations, standards, or procedures in areas with unique land use, site planning, building design or environmental resource issues.
 - An overlay may protect and preserve established character of existing areas of historical note or architectural merit by limiting provisions of underlying base districts in order to more effectively match the density and intensity or established character of the area.
 - The overlay may control demolitions and regulate the preservation, restoration, and rehabilitation of existing structures as well as the design of new infill construction.

- The overlay may also be used to establish allowable land uses that are more prohibitive than the underlying district and to establish specific design guidelines that are more detailed than the standards of this zoning and development code.

■ Enhance The Perception of A Safe Neighborhood

Residents want to have both a real and a perceived sense of safety in their neighborhood. The workshop participants want to continue to see crime against persons and property decrease in the neighborhood.

Recommended City Action Steps:

- Continue to encourage the neighborhood to work with Police Officers in **reporting criminal activity** and eradicate drug dealing.
- Through community policing, **target areas** where drugs seem prevalent, as well as evaluate what automobile traffic is coming through the area and how it creates unsafe conditions.
- Resolve the **safety and vagrancy issues** presented by the homeless.
- **Ensuring safe and well-lit** alleys, streets, and parking areas, transforming land uses that support vagrancy to more desirable land uses will also contribute to a secure neighborhood.
- Improve the physical conditions of the houses, businesses, and institutions in the neighborhoods that will **deter criminal activity** and enhance personal safety and well-being
- Increase awareness and resident participation in **crime prevention** strategies.

■ Replace and/or Install Sidewalks

Residents talked about the need for sidewalk replacement and installation in the neighborhood in areas where sidewalks/curbs don't exist or they are dilapidated. Installation of sidewalks/curbs would beautify the area and better establish connections.

Recommended City Action Steps:

- Establish a relationship with the **Neighborhood** to establish regular lines of communication.
- Establish a **volunteer "infrastructure maintenance" program** to identify problem areas for the City so that they understand the residents' concerns.
 - Conduct a survey of sidewalk and curb conditions and where they are needed.

■ Implement Traffic Management & Traffic Calming Measures

Residents identified the need for traffic management and traffic calming measures at several key streets and intersections in order for the neighborhood to be safer.

Recommended City Action Steps:

- **Manage traffic speeds** and identify strategic locations for installing traffic calming devices such as speed bumps, traffic circles, and stop signs.
- Review **4-way stop locations** and **better signage**.
- Establish another **pedestrian crossing** at critical locations.
- **Enforce parking** controls.

Things The Neighborhood Can Do:

Individual neighborhoods, like the Boarding House Historic District, understand best how to direct their own futures and how to create connections, identity, responsiveness, and neighborhood health.

■ Develop and Maintain A Strong Neighborhood Organization

Neighborhood members recognize the added values of a strong neighborhood association. Collaborative efforts through an association can build the neighborhood, increase pride, and add value to the neighborhood.

Recommended Neighborhood Action Steps:

- Establish a permanent **organizational structure**.
- Build **leadership capacity**; establish working committees.
- Establish a **neighborhood network**, accountability with each other and invest in the neighborhood.
- Establish **a means of communication** using the most efficient tools and technologies.
- **Collaborate with partners** and existing community initiatives to achieve priorities.
- **Get to know the neighbors**. Neighbors should meet residents and property owners. Neighbors should also increase interaction with one another.
- Meet and strengthen **neighbor-to-neighbor relationships**. Partner with local churches, agencies, and businesses to conduct social events and utilize new gathering places to hold them.
- **Encourage Residents to Get Involved**. Attend and participate in the activities of the neighborhood association and other groups that strengthen the network of neighborhood stakeholders
- Organize and launch a **Neighborhood Watch** program.
- **Organize neighborhood tasks** utilizing existing resources that will result in tangible results, such as trash clean-up events, painting projects, alley cleanup, or tree maintenance.
- Identify and **share resources**.

■ Increase and Improve Communication

Residents in the neighborhood know that a very important part of getting things done is to first ensure communication between any and all important parties: governments (City), the Police Department, and, of course, individual residents.

Recommended Neighborhood Action Steps:

- **Invite the directors of City Departments**, and administrative and elected officials, to a meeting to discuss neighbors' issues outlined in this plan.
- **Expand relations between neighborhoods**, work on common concerns

■ Build Neighborhood Partnerships

A neighborhood association is one that has both internal and external support. Neighborhood members should enhance relationships with like-minded organizations in the business, corporate, nonprofit and government sectors to obtain support for the neighborhood and for area projects.

Recommended Neighborhood Action Steps:

- **Partner with like-minded nonprofit groups** to accomplish shared objectives such as property maintenance with Habitat for Humanity, Vo-Tech Student Housing.
- **Partner with local agencies** to obtain young volunteers for help with neighborhood clean ups, minor property maintenance tasks, and student projects. Groups may include churches and high schools student volunteers.
- **Partner with area businesses**. Identify businesses that neighborhood residents patronize to make an investment in the community by funding youth and seniors programs, rehabilitating housing and supporting the neighborhood association.
- **Partner with the City** to improve coordination, identifies funding options, and explore development of a volunteer program to survey "sidewalk conditions."
- Work with **area landlords** to improve the appearance and maintenance of their properties.
- **Encourage renters** to become a part of the neighborhood association and educate them about responsibilities of living in the neighborhood.

■ Actively Pursue Neighborhood Property Maintenance

Participants saw the opportunity to improve both property values and appearances by having well-maintained property. Some homeowners have the knowledge, skills, and resources to evaluate and treat older and historic homes. Residents can work together and with the City to enhance neighborhood preservation and to minimize nuisance code issues.

Recommended Neighborhood Action Steps:

- Design mechanisms to **share neighborhood knowledge**, skills, and resources to evaluate and treat older and historic homes.
- **Assist neighbors**, especially the elderly, who may need help with property upkeep
- **Partner with Christmas in July** and assist neighbors, especially the elderly, who may need help with property maintenance.
- Encourage renters to attend **neighborhood meetings** in order to improve understanding of property maintenance standards.
- Share **neighborhood knowledge** of skills and resources available to renters to address property maintenance issues.
- **Meet with Codes Officers** in order to establish regular lines of communication with that department
- **Support Codes Officers** by following through with complaints and appearing in court to testify against violators

■ Develop And Maintain A Clean Neighborhood

While residents enjoy the many attractive aspects of their neighborhood, they see opportunities for improvement. Reducing the amount of trash, overgrown areas, and dirty streets in the neighborhood is a good first step in building a sense of pride and reaffirms that the neighborhood is a healthy enjoyable place to live.

Recommended Neighborhood Action Steps:

- Reclaim **alleys** and maintain them.
- Partner with the City and AmerenUE to **preserve existing trees** and to provide training for proper tree maintenance and distribution of mulch.
- Organize routine neighborhood **cleanup campaigns** to remove trash and clean street right-of-way areas. Partner with local churches to obtain young volunteers for help with neighborhood cleanup tasks.
- Obtain a more effective means of managing discarded **bulky items, leaves & brush**, tires and tree maintenance.
- Increase bulky item pick-up to handle tenant turn over.

■ Next Steps

Implementation should be action oriented, focusing on the implementation of tools and strategies identified during this self-assessment process. Primary objectives include:

- Adoption of this Plan as a component of the City's Comprehensive Plan, for implementation of the tools and strategies.
- Implementing strategies and actions.
- Monitoring progress on implementation.
- Neighborhood driven improvement and continuous evaluation and update of this Plan.

Implementing this Plan may have significant implications for the City and of course the neighborhood. It may:

- Impact the structure and philosophy in City Hall, specifically in how proactive and responsive City personnel are in targeting and addressing neighborhood needs.
- Revise the criteria the City uses to distribute public resources and programs.

Action Matrices

The Action Matrices serve as a “resource” for directing Plan actions that are necessary to resolve Neighborhood issues and needs.

Each action is sorted into one of the following categories of responsibility:

- **Things We Can Do**
- **Things We Can Do With A Partner**
- **Things The City Should Do**




















The **Action Matrices** include:

- **First Steps**
- **Responsibility**
- **Anticipated Time Frame**
 - Short-term (1 – 5 years)
 - Mid-term (5 – 10 years)
 - Long-term (over 10 years)
 - Ongoing
























































Things We Can Do

First Steps	Priority	Responsibility			Timeframe			
	Votes	Neighborhood	Partner	City	Short	Medium	Long	Ongoing
1. Improve City Department Communication*	14	■	■	■	■			■
2. Set up means of communication = an organization (work, social) *	8	■				■		
3. Community Outreach – Children, Parents, Homeless, Druggies (shelter/food) *	6	■	■				■	
4. Clean-up Trash and Junk *	5	■	■	■	■			■
5. Maintain Own Home *	5	■			■			■
6. Children's Areas *	4	■	■			■		
7. Improve City & Historic Preservation Commission Relations *	3	■		■	■			■
8. Maintain Vegetation and Trash at Signage *	3	■		■	■			■
9. Volunteer Neighborhood Watch *	3	■				■		■
10. Work with City on Water Pressure *	1	■		■		■		■
11. Research for Self-Enabling *	1	■			■			■
Primary Responsibility		■						
Secondary Role		■						

Things We Can Do With A Partner

First Steps	Priority	Responsibility			Timeframe			
	Votes	Neighborhood	Partner	City	Short	Medium	Long	Ongoing
12. Fix-up Run-Down Homes *	15							
13. Improve Police Relations – Presence, Patrol and Prevention, Community Contact Person *	7							
14. Educate Realtors *	7							
15. Community Outreach – Children, Parents, Homeless, Druggies (shelter/food) *	6							
16. Make Homes More Attractive *	5							
17. Clean-up Trash and Junk *	5							
18. Improve City & Historic Preservation Commission Relations *	4							
19. Children's Areas *	4							
Primary Responsibility								
Secondary Role								

Things We Can Do With The City

First Steps	Priority	Responsibility			Timeframe			
	Votes	Neighborhood	Partner	City	Short	Medium	Long	Ongoing
20. Red Tape – Communication, Regulations, Consistency *	12							
21. Program for fixing up properties *	9							
22. Program for vacant properties *	7							
23. Fix Sidewalks (in front of street/houses) *	6							
24. One-Way Streets and Traffic Flow *	4							
25. Homeless/Transitional Housing *	4							
26. Absentee Landlords *	4							
27. Have meetings with the City and Neighborhood – Improve participation and communication (City & HPC) *	3							
28. Speeding through town (Police Radar, Signage) *	2							
29. Improve Police Relations – Presence, Patrol and Prevention, Community Contact Person *	2							
30. Steps and Access to Parks and Walking Trails *	1							
31. Fix Alleyways (regrade, fix potholes, gravel) *	1							
32. Zoning Change – Residential / Light Commercial, Live/Work Opportunities *	1							
33. Children's Areas *	1							
34. Make Neighborhood More Attractive *	1							
Primary Responsibility								
Secondary Role								

Implementation

REVITALIZATION & INCENTIVES

Residents, City Staff, the City Council and the Historic Preservation Commission have identified they would like to see the abandoned and neglected properties in the Boarding House Historic District revitalized. These historic homes and structures are important to the overall character and density of the neighborhood. Utilizing the currently available and understanding additional tools that may be available in the future to incentivize the rehabilitation of these properties is critical to the success of future revitalization of the neighborhood.

Rehabilitation of these properties will encourage further investment into the neighborhood. Keep in mind that the Boarding House Historic District is a locally designated historic district and that all exterior modifications must be submitted to the City in the form of a Certificate of Appropriateness for the Historic Preservation Commission for review to be certain the proposed work meets the requirements of the Board House Historic District Design Guidelines.

Financial Incentives for Rehabilitation - Boarding House Historic District:

There are several existing and potentially available in the future incentives for rehabilitating historic properties within the Boarding House Historic District. These incentives may include the intangible or financially tangible.

Intangible incentives may include the items such as:

- The ability to live within a local historic district with charm and mature trees.
- The ability to live in a historic property within a community of caring homeowners.
- In the future, the neighborhood may be listed on the National Register of Historic Places.
- The ability to live downtown, close to local amenities and recreational opportunities.

Financial incentives may include items such as:

- Potential for lower initial purchase cost. Certain properties that may be owned by the City or are not well maintained may be able to be purchased for a greatly reduced cost, provided there is a financial plan to rehabilitate the property.
- Provision of certain utilities to the site provided by the City (water, sewer, gas, electric)

- Potential for tax abatement.
- Potential for Missouri Department of Economic Development Neighborhood Preservation Act state tax credits.
- Potential for future Missouri State and Federal historic rehabilitation tax credits, once the neighborhood is listed on the National Register of Historic Places.

NPA – Neighborhood Preservation Act

Purpose: The Missouri Department of Economic Development (DED) issues state tax credits to a homeowner who rehabilitates a home or to a homeowner or developer that constructs a new home for owner-occupancy in certain areas of the state. Applications are made through MODED and are granted per a lottery process.

Eligible Areas: "Qualifying Areas" include "distressed communities," ...and areas with a median household income of less than 70% of the median household income for the applicable MSA or non-MSA.

Eligible Uses: This tax credit can be applied to: Income tax, corporate franchise tax, bank tax, insurance premium tax, other financial institution tax. The credits can be carried back 3 years, can be carried forward 5 years and are sellable or transferable.

Funding Limits:

- The credits for a project are determined as follows:
New Residences in Eligible Areas – 15% of eligible costs, tax credits cannot exceed \$25,000 per residence;
- New Residences in Qualifying Areas – 15% of eligible costs, tax credits cannot exceed \$40,000 per residence;
- Substantial Rehabilitation in Eligible Areas – 25% of eligible costs, minimum costs \$10,000, tax credits cannot exceed \$25,000 per residence;
- Substantial Rehabilitation in Qualifying Areas – 35% of eligible costs, minimum costs the greater of \$5,000 or 50% of the purchase price, tax credit cannot exceed \$70,000 per residence.
- Non-substantial Rehabilitation in Qualifying Areas – 25% of eligible costs, minimum costs \$5,000, tax credits cannot exceed \$25,000 per residence.
- <https://ded.mo.gov/BCS%20ProgramDetails.aspx?BCSProgramID=67>

Chapter 353 Tax Abatement Redevelopment Incentive

The 353 Tax Abatement Redevelopment incentive is not currently available, but this is a potential tool for neighborhood revitalization that could be explored. Chapter 353 tax abatement is a redevelopment incentive that is allowed by Missouri law to encourage development of blighted areas through abatement of real property taxes. Neighboring cities that have implemented this incentive include: Liberty, Independence, Blue Springs and Grandview. Some of these incentives focus on residential properties, while others include commercial properties.

Liberty's 353 District allows partial abatement of property taxes for properties within the redevelopment area that are rehabilitated or redeveloped in accordance with their redevelopment plan. The purpose of their plan is to provide a streamlined, cost-effective means for individual property owners to obtain partial tax abatement on their properties in return for making improvements. (Taken from the Liberty Program Guidelines, 2014). Information regarding their specific program can be found on their website <http://libertymissouri.gov/DocumentCenter/View/19505> and in Appendix A.

Independence has offered three neighborhoods the utilization of the 353 Tax Abatement Program. In these neighborhoods, homeowners have previously been or are currently offered a chance to invest in their homes, many which are considered to be historic, and qualify for property tax abatement. The Independence program guidelines can be found on their website <http://www.ci.independence.mo.us/comdev/TaxAbatement> and in Appendix A.

In order for a Chapter 353 tax abatement to be available to the neighborhood, the City of Excelsior Springs or a private entity must first pass an Urban Redevelopment Corporation (URC). The purpose of this URC would be to rehabilitate a blight area.

Tax abatement may be available for a period up to 25 years. Typically, during the first 10 years, the property is not subject to taxes, except that assessed on the land. For the next 15 years, the property may be taxed on an amount equal to 50% of its value.

Missouri State and Federal Historic Rehabilitation Tax Credits

(potential future incentive)

To Qualify: Properties must be individual listed on the National Register or listed as a contributing property within a National Register Historic District.

Purpose: The Missouri Department of Economic Development (DED) issues state tax credits to a taxpayer to provide an incentive for redevelopment of qualified commercial and residential historic structures. Proposed work is reviewed by the State Historic Preservation Office (for state and federal tax credits) and the National Park Service (for federal historic tax credits). All work must meet the Secretary of the Interior's Guidelines for Rehabilitation. Qualified rehabilitation expenses are eligible for the tax credit.

State of Missouri: 25% tax credit for qualified rehabilitation expenses and costs. These credits can be used by homeowners and for income producing properties.

Federal: 20% tax credit for qualified rehabilitation expenses and costs. Federal historic tax credits are eligible for only income-producing properties. Homeowners are **not** eligible for the federal tax credits.

Eligible Uses: This tax credit can be applied to: Income tax, bank tax, insurance premium tax, other financial institution tax. For the state tax credits, the credits can be carried back 3 years, can be carried forward 10 years and are sellable or transferable.

There are application fees for the project review at both the state and federal levels.

<https://ded.mo.gov/BCS%20Programs/BCSProgramDetails.aspx?BCSProgramID=44>

www.nps.gov/tps/tax-incentives.htm

Other Programs and Incentives

MHDC HeRO Program – Through MHDC, the Home Repair Opportunity Program provides funding for repair and maintenance to homeowners through a selected agency, non-profit organization or municipality. Homeowners may receive cash assistance up to \$22,500.

<http://www.mhdc.com/homes/hero/>

First Place Home Buyers and Veterans Assistance – Through MHDC, first-time home-buyers qualified vets may be eligible for assistance with a purchase of a home. More information may be found at:

<http://www.mhdc.com/homes/firstplaceloans/>

USDA Single Family Housing Direct Home Loan – Through the USDA Rural Development Agency, a Section 502 subsidy loan program may assist applicants.

<http://www.rd.usda.gov/programs-services/single-family-housing-direct-home-loans>

USDA Guaranteed Housing Loans – Through the USDA assists approved lenders to purchase or rehabilitate a home in an eligible rural area.

<http://www.rd.usda.gov/programs-services/single-family-housing-guaranteed-loan-program>

USDA Single Family Housing Repair Loan & Grant Program – The USDA Rural Development Agency provides low interest loans and grants up to \$7,500 for repair of health and safety hazards.

<http://www.rd.usda.gov/programs-services/single-family-housing-repair-loans-grants>

EXAMPLE OF APPLICATION OF INCENTIVES FOR REVITALIZATION – Historic House on Benton Avenue



This historic c. 1899 house on Benton Avenue is currently vacant and is in need of an overall rehabilitation in order for the house to become habitable. This house contains original period millwork, doors, wood flooring and charm! However, the house requires a full renovation, including: foundation/floor stabilization; new interior finishes; historic wood flooring restoration;

restoration of historic interior trim; restoration of historic lighting; new mechanical, electrical and plumbing systems; new bathrooms and kitchen' new appropriate exterior windows; exterior rehabilitation (new or restored siding and some trim replacement); and new roof.

This house currently has 2 bedrooms, 1 bathroom, living room, dining room, kitchen and an enclosed rear porch that may have once had a bathroom and laundry facilities. With a little work, the second floor could be finished to have an additional bedroom and full or half bathroom.



Assuming \$150,000 for renovation (not including hazardous material abatement), the existing available and potentially available revitalization incentives may assist with the renovation:

	<u>COSTS</u>	<u>INCENTIVE \$</u>
PURCHASE PRICE (from City)	\$ 500.00	low price
RENOVATION COST**	\$ 150,000.00	
CITY-PROVIDED UTILITIES TO HOUSE	\$ 000.00	\$ 2,500
CURRENT REAL ESTATE TAXES	\$ 429.03	
Appraised Value \$29,000		
353 TAX ABATEMENT – Pay taxes on land only for 10 years.		
For next 15 years, pay taxes on only 50% of assessed value		
Estimated New Real Estate Taxes \$ 1,200 After Rehabilitation		
MO DED NPA TAX CREDIT	\$ 000.00	\$ 52,500
MISSOURI HISTORIC TAX CREDIT	\$ 940.00 *	\$ 37,500
Eligible for residential and income-producing properties		
*Application Fees		
FEDERAL HISTORIC TAX CREDIT	\$ 950.00*	\$ 30,000
Not eligible for residential, unless it is income-producing		
*Application Fees		

Results of Incentives:

Rehabilitation incentives can substantially offset the renovation of the historic structure. Individually, each of these incentives make a difference; when they are piggybacked, the renovation begins to appeal to a variety of individual owners and potential developers. The potential to have a substantial amount of equity in the house after renovation may provide the incentive for the renovation efforts.

These incentives do come with some up-front costs. Hiring qualified consultants to assist with these applications is sometimes recommended. All work must meet the intent of the local Boarding House District Design Guidelines. Work that intends to take advantage of the state and/or federal historic rehabilitation tax credits must meet the requirements of the *Secretary of the Interior's Standards for the Treatment of Historic Properties* in order to be approved by the State Historic Preservation Office and the National Park Service and all proposed work must be done in a sensitive manner.

The lead times for approval some of these incentives must be accommodated for while planning the project. For instance, the state and federal tax credits may take 90 days for approval and the NPA credits are on a lottery system. If the credits are going to be sold or transferred, there are also costs involved with that transaction.



6

Appendix A

- City of Liberty 353 Tax Abatement Downtown Liberty Residential District Program Guidelines
- City of Independence 353 Tax Abatement Program

**STEPS TO PARTICIPATE IN
CHAPTER 353 TAX ABATEMENT PROGRAM
DOWNTOWN LIBERTY RESIDENTIAL DISTRICT**

1. Property owner completes Chapter 353 Application and meets with Economic & Business Development Manager (staff) to determine Base Improvement Value and estimated tax abatement amount and timeframe.
 - Includes required attachments
2. Contract with a licensed inspector (see reverse side) to inspect the improvement area to determine that improvements have not previously been completed or started.
3. Staff schedules a Liberty Municipal Redevelopment Corporation (LMRC) meeting regarding the project. At that meeting, the LMRC will:
 - Make a determination that the project is/is not in compliance with the adopted Redevelopment Plan and Guidelines
 - Approve/not approve the project
 - Approve a Development Agreement between the LMRC, City and property owner for the implementation of the project.
 - Approve an amendment to the Redevelopment Plan

(if a project results in exceeding the allowed total annual tax abatement amount, the LMC will require that the project be considered by the City Council and the taxing jurisdictions be notified)

4. For properties within a Historic District, approval must be obtained from the City's Preservation Office or Historic District Review Commission. Obtain application from Planning and Development Department.
5. Property owner applies for a building permit and/or a ROW Permit when applicable.
6. Construction begins. Two years is allowed for completion of construction.
7. Property owner submits copies of paid receipts, invoices and approved permits to staff.
8. The licensed inspector completes an inspection to certify completion of project per the Development Agreement and compliance with building code (see reverse side).
9. Staff issues a Certificate of Compliance.
10. Deeds are recorded and tax abatement begins. Tax abatement in place until improvement cost is abated or total approved abatement years are reached.

For work requiring a building permit:

- Submit a completed building permit application listing the licensed contractors and cost valuations approved by the City of Liberty for the 353 program
- Submit detailed drawings of proposed work and materials
- Building permit fees shall apply
- Any work in Right of Way shall be subject to a Right of Way Permit

All work requiring Building Permits shall require the services of an approved 3rd party inspection company, meeting the following conditions;

- Must be a current member and certified inspector with ASHI (American Society of Home Inspectors)
- Must be Missouri State Licensed and Insured
- Must have a current City of Liberty business license
- The inspector is fully responsible for conducting all required inspections and for providing detailed inspection reports to the City of Liberty, Building Division
- A final inspection letter & report approving all required inspections shall be presented to the City prior to a Certificate of Occupancy and Certificate of Compliance being issued

For work within the Public Right-of-Way (ROW):

- Work within the Public ROW could include reconstruction of sidewalk as required, retaining wall improvements adjacent to the ROW or sidewalk
- ROW Permits are obtained from the Public Works Department
- Inspections are performed by Public Works Inspectors Only
- For sidewalk reconstruction – Section 25-21 of the Municipal Code identifies conditions of a sidewalk that is in need of repair:
“three-fourths-inch or more out of vertical alignment, or in a badly deteriorated condition”
- The Public Works Department can help determine if your sidewalk needs repair or reconstruction.



CHAPTER 353 PROPERTY TAX ABATEMENT DOWNTOWN LIBERTY RESIDENTIAL DISTRICT PROGRAM GUIDELINES

The Program Guidelines for the Chapter 353 Downtown Liberty Residential District establishes procedures for the implementation of the Downtown Liberty Residential District Redevelopment Plan approved by the City of Liberty City Council by Ordinance No. 10236, on July 14, 2014.

The Downtown Liberty Residential Chapter 353 District (“Downtown Residential District”) allows the Liberty Municipal Redevelopment Corporation (LMRC) to receive partial abatement of property taxes for properties within the redevelopment area in accordance with the Downtown Residential District that are rehabilitated or redeveloped in accordance with the Redevelopment Plan. The purpose of the corporation is to provide a streamlined, cost-effective means for individual property owners to obtain partial tax abatement on their properties in return for making improvements. Stock in the corporation is owned wholly by the City of Liberty and the corporation is managed by a board of directors.

Incorporated in 1829, Liberty is the second oldest incorporated town west of the Mississippi River. Portions of the residential area that surrounds the downtown are included on the local and national register of historic places and include individual buildings on the national register as well.

Properties included in the Downtown Residential District are generally bounded by William Jewell College and Suddarth Place/Michael Arthurs 2nd Addition neighborhoods on the east; then along the south side of Michael Arthurs 2nd Addition neighborhood to Leonard Street; the boundary continues south on Leonard Street to 291 Highway; the boundary continues west from 33 Highway to the west side of South Village Addition; then continues north along the west side of South Village Addition/Ford Place/Lincoln Place/Grooms Addition neighborhoods to Shrader Street; the boundary continues west along Shrader Street to the west side of Baldwin Place neighborhood; the boundary continues north along Fairview Avenue to approximately Mississippi Street; the boundary then runs east along Mississippi Street to Morse Avenue then continues north on Morse Avenue; the boundary then runs east along Corbin and Doniphan Streets to the west side of College Place West neighborhood. The area excludes the existing

Chapter 353 Liberty Downtown Area. The exact boundary is depicted by the Boundary Map included as part of the Development Plan.

This area includes 929 parcels.

Purpose

The purpose of this program is to provide the owners of specific parcels an incentive to rehabilitate their properties to remove any blighting influences, encourage reinvestment, encourage preservation as appropriate and improve the value and appearance of neighborhoods. As properties are improved over time and other improvements are made in accordance with the redevelopment plan, the redevelopment area is revitalized.

Description of Program

The program is intended to preserve and enhance the homes within the neighborhoods included in the Abatement Area and thereby enhance the neighborhoods they're included in. Five neighborhoods have been identified as local historic districts ("Historic Districts") and will require adherence to specific design guidelines and approval steps previously identified through adopted Historic District Design Guidelines and the Unified Development Code, Section 30-70, Historic Preservation Overlay District. Other neighborhoods not identified as a Historic District do not have specific guidelines but are required to follow eligible and non-eligible improvement guidelines contained herein in order to participate in the tax abatement program. See Attachment A for a list of improvements.

Chapter 353 tax abatement program provides that, once a property is transferred through a redevelopment corporation, the real property shall not be subject to assessment or payment of general ad valorem taxes for a period not to exceed ten (10) years except on the basis of the assessed value of the land, exclusive of improvements, during the calendar year prior to the year in which the LMRC acquired title to the property (title to the property is immediately transferred back to the homeowner). Thus, under a standard 353 project, the property owner is only paying taxes on the value of the land during the first ten years of abatement.

In addition, Missouri law allows for 50% abatement on the whole value of the property (land plus improvements) for up to an additional 15 years. Although Missouri law allows for an additional 15 years of abatement, Liberty program guidelines only allow for an additional five (5) year abatement in certain circumstances.

The abatement period will cease once the project cost has been reimbursed or the approved number of years of abatement has expired.

Minimum Project Improvements Required

- A. Base Improvement Value – In order to qualify for the 353 tax abatement, there is a minimum project improvement value that must be met. The “Base Improvement Value” minimum requirement for the improvements shall be the value of not less than the net Present Value @6.5 percent of the taxes abated over a ten year abatement period based on the current assessed value (with an assumed annual increase in value of 0.54 percent), but not less than \$3,500 for the eligible improvements on the existing structure(s) on the property. Net present value is utilized because it demonstrates the future value of an investment over time.

Certain improvement costs do not qualify for abatement (described below under Ineligible Improvements).

Fifty percent of actual construction cost must be for exterior improvements. Project Costs includes the entire cost of the project (construction, materials, architectural and engineering costs, fees, permits) excluding ineligible improvements. Construction Costs includes materials and labor excluding architectural and engineering costs, fees, permits and financing costs.

- B. Base Project Improvements – The minimum improvements required for all construction receiving tax abatement must comply with the following and will count towards the Base Improvement Value:
- All construction must conform to City codes.
 - To improve thermal efficiency of a dwelling, all doors and windows must be weather-stripped to reduce infiltration of air when existing is inadequate or nonexistent. All openings, cracks or joints must be caulked or sealed.
 - All broken windows/window panes and doors must be replaced.
 - Each project must, as prescribed by City code, be provided with a minimum of one approved, listed, labeled and operational smoke detector per bedroom and one on each floor. Carbon Monoxide Detectors must be installed on each floor.
 - In conformance with the ordinances of the City of Liberty, any sidewalk in front or alongside of a house or lot shall be in good repair. Any portion of a sidewalk that is not in good repair must be replaced. New or replacement sidewalks shall match the width of sidewalks on adjacent properties and be constructed to the construction standards of the City of Liberty. If a property owner is required to replace sidewalk, the property could qualify for up to an additional three (3) year tax abatement (beyond the initial 10 years) based on 50% of the then current full value of the property. This extension is available only if the cost of the sidewalk is not repaid within the initial ten (10) year tax abatement period and/or for the length of time necessary to recoup the cost of the sidewalk up to the additional three (3) years.

The applicant may contact the Public Works Department of the City of Liberty for an inspection of sidewalks at any time. Applicants should be aware that sidewalks might become damaged over time or as a result of extensive home rehabilitation or construction activities. Applicants may want to be certain that the contractors they choose to do their rehabilitation work will guarantee that they will repair sidewalks that they damage, otherwise the applicant will be responsible for repairing a sidewalk damaged by the contractor.

- Existing retaining walls must be in good condition and restored to maintain structural integrity.
- Turf and/or planted beds are required in the front and back yards. Plantings shall not be overgrown.
- Electrical service must be provided to each dwelling unit. Where it is found that the electrical system in a structure constitutes a hazard to the occupants or the structure by reason of inadequate service, improper fusing, insufficient receptacle and light outlets, improper wiring or installation, deterioration or damage, or for similar reasons, the City will require the defects to be corrected to eliminate the hazard.
- One street tree per City code is required.

Eligible Improvements

A. General Improvements - Any repair is acceptable in the Base Project Improvements requirement that may affect the health and safety of the occupants. Minor or cosmetic repairs by themselves, however, cannot be included as a part of the Base project. Examples of eligible improvements are listed below. This is not inclusive and only lists the types of work that may be done. The Base Project Improvements, specifies the improvements that must be done for a property to receive tax abatement. The following improvements may apply toward the Base Project Value. A more complete list can be found in Attachment A.

- Structural alterations and reconstruction including additions, chimney repair, finish basements.
- Masonry work
- Elimination of lead based paint and asbestos removal on homes built prior to 1978.
- Changes for aesthetic appeal and elimination of obsolescence (i.e. new exterior finishes, new porch and/or decks)
- Replacement of plumbing, furnace replacement, air conditioning including replacement of window units with central systems, new plumbing fixtures.
- ADA accessible improvements
- Roof replacement/repair, gutters and downspouts
- Window and door replacement/repair
- Flooring, tiling, carpeting, painting (interior and exterior)
- Energy conservation improvements. Solar panels should be mounted flush with the roof on a secondary façade.

- Demolition
- Major landscaping, drainage improvements to preserve the property from erosion and/or fixing drainage problems, and fencing.
- Labor and materials.

Wherever a property is located within the Chapter 353 Residential Area A, there are items that, while they may be allowed, may or may not be eligible for Chapter 353 tax abatement. Refer to Attachment A for a complete list.

- B. Local Historic District Properties - Properties located within local historic districts must follow the Historic District Design Guidelines. If a property owner within a local historic district removes any aluminum or synthetic siding and restores with a wood/wood based product (as required within the Historic District Design Guidelines), the property could qualify for up to an additional five (5) years of tax abatement (beyond the initial 10 years) based on 50% of the then current full value of the property. This extension is available only if the cost of the historic district improvement is not repaid within the initial ten (10) year tax abatement period and/or for the length of time necessary to recoup the cost of the historic district improvement up to the additional five (5) years. Properties within local historic districts must have exterior work approved by the HDRC.
- C. Properties Outside Local Historic Districts -- If a property located outside of the local historic districts opts to comply with the adopted Historic District Design Guidelines, the property could qualify for up to an additional five (5) years of tax abatement (beyond the initial 10 years) based on 50% of the then current full value of the property. This extension is available only if the cost of the historic district improvement is not repaid within the initial ten (10) year tax abatement period and/or for the length of time necessary to recoup the cost of the historic district improvement up to the additional five (5) years.

Ineligible Improvements

Although conventional improvements are encouraged within the neighborhoods, there are certain improvements that cannot be applied towards a tax abatement calculation. These ineligible improvements are included in Attachment A.

Program Implementation

A. Application Process

- The applicant is required to attend a preliminary meeting. The applicant should bring current pictures of the site and existing structures (interior and exterior), completed property evaluation form and most current real estate tax statement.

- Upon initial review by staff, the applicant will subsequently provide an itemized cost of improvements including listing by exterior and interior as well as drawings of improvements to be completed.
- Based upon this information, and as a result of an inspection by a licensed inspector (provided by applicant), the LMRC will determine the Base Improvement Value. The licensed inspector will verify that the improvements proposed include the Base Project Improvements, that proposed improvements have not already occurred and upon completion of the improvements, verify that the work has been completed.
- Properties receiving tax abatement must meet and be maintained in compliance with the minimum standards, codes and ordinances of the City. Non-compliance may result in loss of tax abatement.
- The LMRC shall consider a development performance agreement between the property owner and LMRC describing the obligations to carry out the development plan. Included are procedures the tax abatement period, the schedule for construction and the transfer of title to the property.
- Applicant applies for a building permit.
- A notice to proceed is issued by the Building Official and construction begins. A total period of up to two (2) years is allowed for full compliance to the Development Agreement. A request for extension of time to complete improvements or inclusion of additional improvements may be submitted along with reason for extension or additional improvements to staff for consideration. The request must include a list of required improvements still to be completed and a proposed time frame for completion (not to exceed one (1) year). Inclusion of additional improvements must meet the requirement of 50% exterior construction cost.
- When all improvements are complete, the applicant must submit copies of paid receipts, invoices and approved permits to show property is ready for final inspection.
- A final inspection is conducted to certify completion and a Certificate of Compliance and Tax Abatement is issued.
- The LMRC files and records Deeds (deed to LMRC in a.m.; deed back to property owner in p.m.).
- The applicant shall pay, each year during the abatement period, the taxes based upon the existing land value in accordance with state statutes.

B. Submittal Requirements

- Completed Application
- Pictures of the site and existing structures (interior and exterior)
- Legal description of the property
- Itemized cost of improvements including listing by exterior and interior
- Most current real estate tax statement.
- Application Fee (\$200).

- Additional information may be required depending upon the project and requests by the LMRC.

- C. Application Fee - \$200 provided prior to LMRC determining Base Improvement Value.
- D. Application Acceptance - Applications will be accepted during the 10- year period from 2014 to 2024. New applications will be accepted each year during this period, however, the property tax amount abated as a result of applications received each year will not exceed a total of \$15,000 in new abated property taxes. For example, in any one year, the City Council may grant up to \$15,000 (cumulative) in property tax abatement amount regardless of the number of applications. The City Council may continue to grant an additional \$15,000 in property tax abatement each year. The City Council shall have the ability to grant an additional increase in the annual allowed amount on a case by case basis. At such time as the maximum annual allowed amount is realized each year, staff shall provide the City Council with an update of any outstanding applications submitted for consideration. The City Council, can at that time recommend an increase in the maximum allowed amount to accommodate the applications submitted for that year.

The City Council shall receive notification of each Redevelopment Project approved by the LMRC, including project improvements and estimated tax abatement amount. An annual report shall be submitted each year by November 30 to the City Council.

- E. Performance Agreement - The granting of tax abatements are conditioned upon the property owners executing a Performance Agreement with the LMRC in a form acceptable to LMRC. The City Council reserves the right to alter these guidelines upon proper noticing of the property owners within the Residential Tax Abatement Area A.

ATTACHMENT A

IMPROVEMENT	CLARIFICATION
Base Required Improvements	
Weather-strip, caulk and seal all openings, cracks and joints to reduce air infiltration	
Replace exterior broken windows/window panes and doors	
Installation of smoke detectors and carbon monoxide detectors	<i>Each sleeping area must include at least 1 approved, listed, labeled and operational smoke detector plus each common area and basement. Carbon monoxide detectors installed and operational on each floor.</i>
Insulate all openings in exterior walls where cavity has been exposed in rehab work	
Minimum 1 off-street paved/permeable parking space must be required per unit or in accordance with zoning requirements	<i>Dimensional standards according to City Code. No space shall be within right-of-way; only driveway or alley approaches are permitted. Driveway approach shall not exceed the width identified within the Unified Development Ordinance for residential areas. Some properties may need to apply for variance.</i>
Sidewalk in front or alongside of a house or lot shall be in good repair. If not in good repair or nonexistent the sidewalk must be replaced/reconstructed	<i>Must match the width of sidewalks on adjacent properties and be constructed to standards of City of Liberty. May qualify for an additional 3 years of abatement. Sidewalk requirement per City Code (i.e. sidewalk may only be required on one side of street).</i>
Any retaining walls must be restored to show structural integrity	
Permanent plantings on property must not be overgrown	
Front yard must contain turf and planting beds	
One street tree must be maintained in front yard	<i>Tree species as approved within the Liberty street tree list.</i>
Where it is found that the electrical, mechanical and plumbing system(s) in a structure constitutes a fire and/or other hazard to the occupants or structure, the defects must be corrected to eliminate the hazard	<i>Even by reason of inadequate service, improper fusing, insufficient receptacle and light outlets, improper wiring or installation, deterioration or damage, or for similar reasons.</i>
Eligible Improvements that can apply towards base	
Structural alterations and reconstruction including additions, chimney repair, finished basements	
Masonry work	
Elimination of lead based paint and asbestos removal on homes built prior to 1978	
Changes for exterior aesthetic appeal and	<i>New exterior finishes, new porch and/or decks</i>

elimination of obsolescence	
Installation and/or replacement of interior finishings for aesthetic appeal and elimination of obsolescence	<i>Finishes could include countertops, cabinetry, sinks/tubs/showers including fixtures, flooring, and tile.</i>
Replacement of plumbing, furnace replacement, new central air conditioning, replacement of window units with central systems, new plumbing fixtures	
ADA accessible improvements	
Roof replacement/repair, gutters and downspouts	<i>Downspout/sump pumps must not flow directly into storm sewer/wastewater lines.</i>
Exterior window and door replacement/repair and interior door replacement if associated with room addition/alterations	
Flooring, tiling, carpeting, painting (interior and exterior)	
Energy conservation improvements	<i>Permanent improvements only (excludes appliances such as refrigerators, washer/dryer units/stoves/ovens/dishwashers). Solar panels should be mounted flush with the roof on a secondary façade.</i>
Insulation	
Demolition	<i>If a complete demolition, a replacement home must be compatible with the neighborhood.</i>
Drainage improvements and certain landscaping improvements	<i>Qualified landscaping expenses must show landscaping made to preserve the property from erosion and/or fixing drainage problems. Drainage must not result in runoff onto neighboring properties. Excludes irrigation systems and other landscaping not associated with drainage improvements.</i>
Labor and materials	
Improvement eligible for additional tax abatement years	
Sidewalk	<i>Eligible for up to an additional 3 years*</i>
Removal of aluminum and synthetic siding	<i>Must be replaced with wood/wood base siding material to qualify for tax abatement program.</i> <i>(aluminum and/or synthetic siding is allowed on homes not within local historic districts but will not apply towards tax abatement calculation)</i> <i>Eligible for up to an additional 5 years*</i>
Improvements made to properties not within the local historic districts that meet historic district guidelines	<i>Eligible for up to an additional 5 years*</i>
Improvements not eligible for tax abatement	
Aluminum or vinyl siding	

Replacement of window frames with aluminum, steel and vinyl window frames	<i>Unless the window frames are currently aluminum, steel or vinyl</i>
Removable fixtures	<i>Includes light fixtures, ceiling fans, blinds/window treatments, shelving (non built-ins), appliances (except as allowed under Eligible Improvements above)</i>
Any improvements completed as part of an insurance claim or being reimbursed as part of an insurance claim	
Sheds and foundation work to place sheds	
Pools, in-ground and above-ground	
Irrigation systems	
Use of hazardous materials	
Work included to create additional living units within a structure intended to be a single-family home	<i>Existing multi-tenant buildings cannot increase current number of units, unless zoning designation allows.</i>
Signage	
Value of labor by the property owner for work not requiring a building permit	
Minor landscaping improvements	
Fencing	

Exterior improvements to properties located within the local historic districts must seek approval through the City's preservation office and/or Historic District Review Commission.



City of Liberty

APPLICATION FOR RESIDENTIAL CHAPTER 353 TAX ABATEMENT

DATE:

PROPERTY OWNER INFORMATION

Owner Name: _____

Street Address: _____ City/St/Zip: _____

Phone No.: _____ Email: _____

Address of Requested Abatement: _____

Historic District: Jewell Dougherty Lightburne Fairview N/A

DESCRIPTION OF IMPROVEMENTS

Exterior Improvements: Attach itemized bid(s) for work – be as specific as possible Investment Amount:

Interior Improvements: Attach itemized bid(s) for work – be as specific as possible Investment Amount:

PROJECT REQUIREMENTS

Description of Project Timeline 50% exterior*: Yes
No

Start of Construction: Estimated Completion:

Base Improvement Value (City provide):

REQUIRED ATTACHMENTS:

1. Itemized cost of improvements including listing by exterior and interior
2. Current pictures of the site and existing structures
3. Legal description of property
4. Most current real estate tax statement
5. Proof of property ownership
6. Application Fee (\$200)

*50% of actual construction cost (excludes architectural & engineering costs, fees, permits and financing costs)

Summary of the Application Process

The following represents a typical application and approval process. This process may vary according to individual circumstances.

- The property owner receives a copy of the Fairmount-Carlisle Tax Abatement Program Guidelines, informational brochures and materials, and completes a pre-application.
- The property is inspected by the Tax Abatement Administrator to identify deficiencies and recommend improvements. (Forms are provided).
- The Tax Abatement Administrator assists the homeowner to complete the required exhibits for submission.
- The Tax Abatement Administrator will assist the applicant in determining the Base Project requirements.

The Tax Abatement Administrator prepares the write-up and cost estimate and any required architectural exhibits. In some cases, the applicant can complete the work by themselves.

All work write-ups are approved by the City of Independence for conformance with code compliance and Fairmount-Carlisle Tax Abatement Program Guidelines. Work may not proceed until a “Notice to Proceed” is granted.

Upon Completion, all work is inspected and a Certificate of Final Inspection is granted.

The Fairmount-Carlisle Redevelopment Corporation shall approve all applications for tax abatement.

Certificate of Tax Abatement is issued to the applicant.

Variances: In the event of practical and necessary hardship, the Fairmount-Carlisle Redevelopment Corporation may vary some of the requirements depending upon individual circumstances.

Review/Appeals: All completed work will be reviewed by the Housing Services Administrator and/or City staff to ensure that the recommended rehabilitation work is completed.

City of Independence
Community Development Department
111 East Maple Street
Independence, MO 64050
(816) 325-7109
www.independencemo.org

The Fairmount-Carlisle Tax Abatement Program



**Fairmount-Carlisle
Redevelopment Corporation**

City of Independence



City of
Independence
Missouri

Introduction

Because you own or are considering owning a property located in the Fairmount-Carlisle Redevelopment Area you are entitled to an abatement of your real estate taxes, provided you complete the rehabilitation requirements described in this program.

Essentially, this means that you will not pay real estate taxes on redeveloped property for 25 years as described below. If you sell the property, the new owner is entitled to an abatement on the home (excluding land assessment) for the stated period.

Year 1 - 10: 100% abatement
Year 11-25: 50% abatement

This brochure will explain the requirements of the program and answer some basic questions. For more information call the Tax Abatement Administrator at 816-325-7109, send an email to jleipzig@indepmo.org or stop by the Community Development office at 111 E. Maple, Independence, MO 64050.

Program Basics

The Fairmount-Carlisle Redevelopment Corporation or City Staff is able to assist you in determining if your property is located in the redevelopment area.

In addition to standard rehabilitation of an older structure, the program can be used with new construction, such as a room addition or landscape improvements, provided the construction project conforms to the Fairmount-Carlisle 353 Redevelopment Plan.

The tax abatement can be used in connection with other housing programs and renovation or remodeling programs available through the City of Independence to accomplish rehabilitation and/or improvement of an eligible property.

You may also qualify for other housing programs.

For more information call the City of Independence Community Development Department at 816-325-7109.

Program Guidelines

The minimum base project amount allowed for essential repairs or construction is \$3,500 or the net present value of the tax abatement figured over a 25-year period, whichever is greater. There is no maximum amount.

Generally, any repair that improves the safety and health of the occupants is acceptable.

Once a base project requirement is established, additional improvements such as fencing can be included.

In general, base projects affect the major systems of the home.

Redevelopment corporation staff can assist you in determining your base project requirement.

The property owner can employ an architect or consultant to prepare the proposal.

If deemed necessary by the redevelopment corporation staff, other exhibits may need to be submitted.

The redevelopment corporation staff can assist you with any of these items. These exhibits will depend upon the condition of the property.

Base Projects

Structural repairs

Chimney repairs

Structural additions

Adding a bath

Finishing an attic or basement

Repair of termite damage

Permanent appliance installation

New exterior siding

Repair/replace furnace

Repair/replace central air

Repair/replace electrical system

Repair/replace plumbing

Repair/replace roof and guttering

Emergency conservation improvements

Major landscaping to increase value

Accessibility improvements

New walks and driveways

Paved off-street parking

Interior and exterior painting

City of Independence

Fairmount-Carlisle 353 Residential Tax Abatement and
Design Guidelines for Parcel Specific Properties**I. Introduction**

This document establishes procedures for the utilization of parcel specific tax abatement included in the Fairmount-Carlisle 353 Redevelopment Plan (FCRP) approved by the City of Independence, Missouri, by Ordinance No. 16615, on February 20, 2007. The approved Redevelopment Plan allows the Fairmount-Carlisle 353 Redevelopment Corporation to receive abatement of property taxes for properties that are redeveloped or rehabilitated in accordance with the Redevelopment Plan. The Redevelopment Corporation has the option to assign or “pass on” the real estate tax abatement to the owners of specific parcels (“Parcel Specific Tax Abatement”) if they, too, redevelop or rehabilitate the properties in accordance with the Redevelopment Plan. The ability to assign property tax abatement to others differs from most Chapter 353 Redevelopment Plans, which assume that a redevelopment corporation will own and redevelop all properties within the redevelopment area. The primary benefit of tax abatement, therefore, flows to the redevelopment corporation in such projects.

Properties included in the abatement area are generally bounded on the far west by Hillcrest running southwesterly along the Union Pacific Railway to Brookside Avenue; the boundary continues East along Truman Road to the area just west of Forest Avenue; the boundary then runs north to U.S. 24 highway; on the north again along U.S. 24 Highway from approximately Forest Avenue to just east of Hardy; and on the east from approximately Hardy Avenue to Evans; along the north along the municipal boundary at approximately Evans, Parkview and the city owned property located north of Norledge Avenue; and between Home and Hillcrest.

The Fairmount-Carlisle 353 Redevelopment Plan – Amendment 1 includes the Procter, Bristol and Fairland Heights neighborhoods, in addition to the original Plan area neighborhoods (Mt. Washington, Fairmount, Carlisle and Bundschu) located northwest Independence, as indicated by the Vicinity Map. Exhibit A. The Amendment 1 documents include the parcels from the original development plan, and additional parcels on the south side of Truman Road from the railroad tracks north of Turner Street and Chrysler Avenue to include both sides off 18th Street to Brookside Avenue. The expanded area also includes properties along both sides of Brookside Avenue from 18th Street to the northern city limits with exclusion of Mount Washington Cemetery. This area would include an additional 2,249 parcels and bring the total number of parcels in the revitalization area to 4,893.

II. Purpose and Applicability

The purpose or intent of this program is to give the owners of specific parcels an incentive to rehabilitate their properties. As properties are thus improved over time, and other improvements are made as outlined in the Fairmount-Carlisle 353 Redevelopment Plan, the redevelopment area is revitalized, which is a primary goal of this plan.

These guidelines specify minimum standards and requirements that should be met to ensure that the rehabilitation of parcel specific properties accomplishes the goals of the Fairmount-Carlisle 353 Redevelopment Plan for neighborhood revitalization. These guidelines apply only to rehabilitation projects where Parcel Specific Tax Abatement is used.

To encourage redevelopment and rehabilitation, Section 353.110 of the state statutes provides that real estate taxes may be abated on the redeveloped property according to the following schedule.

- **Year 1-10** **100 percent abatement (excludes land assessment)**
- **Year 11-25** **50 percent abatement (excludes land assessment)**

III. Eligible Property

All parcels located in the Fairmount-Carlisle 353 Redevelopment Area are eligible for parcel Specific Tax Abatement. These guidelines may be utilized for properties up to two (2) residential units. This design will include condo-type dwellings. Adhering to the standards herein may likely mean that the number of units in structures must be reduced to meet certain requirements, especially those related to parking. This requirement thereby creates an incentive for the reduction of units of properties.

The assignment of Parcel Specific Tax Abatement to individual property owners for residential rehabilitation will be administered through the Redevelopment Corporation City staff staffing. Final approval is granted by the Fairmount-Carlisle Redevelopment Corporation Board of Directors to qualifying properties.

The program can be used in connection with new construction, provided such new construction is in conformity with the Fairmount-Carlisle 353 Redevelopment Plan.

IV. Base Project Minimum

Parcel Specific Tax Abatement may be used in part for the rehabilitation and/or improvements to a property. There is a "Base Project" minimum requirement for the improvements in value of not less than the net Present Value @ 6.5 percent of the taxes abated based on the current assessed value (with an assumed annual increase in value of 0.54 percent), but not less than \$3,500 for the eligible improvements on the existing structure(s) on the property. Net Present Value is utilized because it demonstrates the future value of an investment over time. Rehabilitation or improvements to a detached garage, a new detached garage, or the addition of an attached unit(s) (if allowed by local zoning ordinances) can also be included in this Base Project.

V. Required Improvements

The Base Project for all rehabilitation construction and/or additions receiving parcel Specific Tax Abatement must comply with the following:

A. Effective Energy Conservation Standards

- (1) **Addition to Existing Structure.** New Construction must conform to City codes.
- (2) **Rehabilitation of Existing Structure.** To improve the thermal efficiency of the dwelling, the following are required.
 - (a) Weather-strip all doors and windows to reduce infiltration of air when existing weather stripping is inadequate or nonexistent.
 - (b) Caulk or seal all openings, cracks or joints in the building envelope to reduce air infiltration.
- (3) **Insulate all openings** in exterior walls where the cavity has been exposed as a result of the rehabilitation. *Fairmount-Carlisle Redevelopment Corporation requires repair and/or replacement of broken windows or windowpanes.*
- (4) **Replacement Systems**
 - (a) Heating, ventilating and air conditioning system supply and return pipes and ducts must be insulated whenever they run through unconditioned spaces.
 - (b) Heating systems, burners, and air conditioning systems should be carefully sized to be no greater than 15 percent oversized for the critical design, heating or cooling, except to satisfy the manufacturer's next closest nominal size.

- B. Smoke detectors and Carbon Monoxide Detectors.** Each sleeping area must be provided with a minimum of one (1) approved, listed, labeled and operational smoke detector, interior common areas and in the basement. Carbon Monoxide Detectors must be installed and operational on each floor.
- C. Driveways and Off-Street Parking.** A minimum of one paved off street parking space must be provided per unit, or in accordance with other zoning requirements. A minimum of 8.5 feet by 18 feet per space and in accordance with other dimensional standards according to City code.
- (1) Pavement must not be broken up or severely cracked in any location
 - (2) No parking areas are allowed within the right-of-way; only driveway or alley approaches are permitted.
 - (3) Driveway approach must be paved and width should match the original to maintain the historic intent of the property. This may be altered, if necessary, to accommodate current vehicular standards. In no cases shall the driveway approach width be altered to exceed 20 feet in residential areas.
 - (4) The minimum amount of parking that must be provided must adhere to current zoning codes for the proposed use; even if the use has attained "legal non-conforming" status per the City's zoning code.
 - (5) Some properties may need to apply for a variance concerning driveways.
- D. Sidewalks**
- (1) In conformance with the ordinances of the City of independence, any sidewalk in front or alongside of a house or lot shall be in good repair. Any portion of a sidewalk that is not in good repair must be replaced.
 - (2) New or replacement sidewalks shall match the width of sidewalks on adjacent properties and be constructed to the construction standards of the City of Independence.
- The applicant may contact the Public Works Department of the city of independence for an inspection of sidewalks at any time. City Code requires that any portion of a sidewalk that the Public Works Department determines is not in good repair must be replaced. Applicants should be aware that sidewalks might become damaged over time or as a result of extensive home rehabilitation or construction activities. Therefore, the applicant may need to replace portions of sidewalk in acceptable condition at the beginning of a project. Applicants may want to be certain that the contractors they choose to do their rehabilitation work will guarantee that they will repair sidewalks that they damage. Sidewalks shall be in good repair throughout the period of tax abatement.
- E. Landscape**
- (1) Minimum Required**
- (a) Turf and/or planted beds in the front and back yards.
 - (b) All fences must be located behind the front building line. All exceptions require design review.
 - (c) Permanent foundation plantings other than flowers must be provided on all structures in the front yards, and side, where visible from the street, of the property, and must not be overgrown. Maintenance improvements must be made as necessary, including planting bed improvements as described below.
- (2) Maintenance Improvements**
- (a) Areas of pervious pavement or gravel should be improved with a minim of three (3) inches of topsoil to promote growth of vegetation.
 - (b) Retaining walls shall be restored to exhibit structural integrity.
 - (c) Improvements to reduce maintenance problems in high maintenance areas in front and side yard should be considered. This will likely include areas of severe slopes (over 3:1 slope) areas where mowers cannot be used (grass or weeds adjacent to vertical elements).

- (d) Planting beds should be constructed to minimize future maintenance problems including stripping sod (and weeds), adding topsoil and soil amendments, applying a pre-emergent, and covering with a mulch material. An edging material may also be appropriate.
- F. Architectural Review Criteria.** New and existing buildings, structures and appurtenances that are constructed, moved, reconstructed, materially altered or materially repaired shall be visually compatible in accordance with applicable City Codes.
- G. Electrical Service.** There shall be a minimum of 100 amp electrical service to each dwelling unit (except single room occupancy units). Where it is found that the electrical system in a structure constitutes a hazard to the occupants or the structure by reason of inadequate service, improper fusing, insufficient receptacle and light outlets, improper wiring or installation, deterioration or damage, or for similar reasons, the city will require the defects to be corrected to eliminate the hazard. (See Attachment A.)

VI. Eligible Improvements

Any repair is acceptable in the Base Project requirement that may affect the health and safety of the occupants. Minor or cosmetic repairs by themselves, however, cannot be included as a part of the Base Project. Examples of eligible improvements are listed below. This list is not all inclusive and only lists the types of work that may be done. Section V, Required Improvements, specifies the improvements that must be done for a property to receive the tax abatement. However, the following improvements may be applied toward the base project minimum.

- A. Structural alterations and reconstruction, including the construction of basements**-(e.g., repair or replacement of structural damage, chimney repair, additions to the structure, installation of an additional bath (s) finished attics and/or basements, repair of termite damage and the treatment against termites or other insect infestation, etc.).
- B. Elimination of health and safety hazards**-(including the resolution of defective paint surfaces or lead-based paint problems on homes build prior to 1978 and asbestos removal).
- C. Changes for aesthetic appeal and elimination of obsolescence**-(e.g. new exterior siding, adding a second story to the home, covered porch, porch and stair railings).
- D. Reconditioning or replacement of plumbing**-(including connecting to public water and/or sewer system), heading, air conditioning, including replacement of window units with a central system and electrical systems. Installation of new plumbing fixtures is acceptable.
- E. Improvements for accessibility to the handicapped**-(e.g. remodeling kitchens and baths for wheelchair access, lowering kitchen cabinets, installing wider doors and exterior ramps, etc.) Exterior ramps require conformance with design standards.
- F. Roofing, gutters and downspouts**
- G. Flooring, tiling and carpeting**
- H. Energy conservation improvements**-(e.g. new double pane windows, storm windows, steel insulated exterior doors, insulation, caulking and weather stripping, etc). *Repair of broken windows and windowpanes is required by the Fairmount-Carlisle Redevelopment Corporation as stated in Section VII, Required Improvements.*
- I. Major landscape work and site improvement**-patios, decks and terraces that improve the value of the property. Also, landscaping as required in Section V, Required Improvements or those required to preserve the property from erosion, count toward the base project minimum. The correction of grading and drainage problems also is acceptable. Tree removal on private property is acceptable if the tree is a safety hazard to the property. Repair of existing walks and driveway is recommended if it may affect the safety of the property.
- J. Driveways and paved off-street parking areas**-(the minimum required to meet standards per unit).
- K. Major interior and exterior painting, including required pre-paint preparation-**
- L. Any improvement required under Section V, Required Improvements-**

- M. Wiring or electrical system upgrades**-improvements to the existing wiring or electrical panel to bring the property into conformance. (See Attachment A. City of Independence, ELECTRICAL CODE MINIMUM STANDARDS).
- N. Expansion Of floor area**- improvements that increase the overall floor area, or will provide additional square footage to increase the value of the home.

VII. Architectural Exhibits

The improvements must comply with all local codes and ordinances. The property owner may decide to employ an architect or a consultant to prepare the proposal. The property owner must provide the Redevelopment Corporation with the appropriate architectural exhibits that clearly show the scope of work to be accomplished. The following list of exhibits is recommended, but may be modified by the Redevelopment Corporation as required.

- A. Plot Plan of the Site** is required if a new addition is being made to the existing structure. Show the location of the structure(s), walks, drives, streets, and other relevant detail. Include finished grade elevations at the property corners and building corners. Show the required flood elevation.
- B. Proposed Interior Plan of the Dwelling.** Show where structural or planning changes are contemplated, including an addition to the dwelling.
- C. Parking and Landscape.** Where parking improvements are included, a plot plan is required. Where landscape improvements are included, any format may be used to demonstrate compliance with minimum requirements.
- D. Graphics for Design Review.** Graphics sufficient for design review shall be provided.
- E. Work Write-Up and Cost Estimate.**
 - 1. Any format may be used for these documents; however, quantity and the cost of each item must be shown. Also, include a complete description of the work for each item (where necessary). The Rehabilitation Checklist provided at homeowner orientation and the inspector's inspection summary should be used to ensure all work items are considered.
 - 2. Cost estimates must include labor and materials sufficient to complete the work by a contractor.
 - 3. Property owners doing their own work can include the cost estimate for labor in determining if the minimum requirements for the Base Project are being met. The value of work is allowed toward meeting the base minimum. (Attachment B)
 - 4. The Work Write-Up does not need to reflect the color or specific model numbers of appliances, bathroom fixtures, carpeting, etc
 - 5. The consultant who prepares the work write-up and the cost estimate (or an architect, engineering or home inspection service) needs to inspect the property to assure (a) there are no rodents, dry rot, termites and other infestation and there are no defects that will affect the health and safety of the occupants. (b) the adequacy of the existing structural, heating, plumbing, electrical and roofing systems, and (c) the upgrading of thermal protection (where necessary). (d) Architectural fees for preparing the work write-up can count toward the base project amount. (e) The current wage rates for self-performed labor will be determined by the corporation and that information will be distributed to the applicant at the time of the orientation.

VIII. Tax abatement Not Intended for the Conversion to Additional Rental Units.

Generally, it is not intended that an investor should be allowed to utilize tax abatement to rapidly accumulate properties that clearly and collectively constitute a multi-family project. An investor utilizing tax abatement shall not have an interest in more than seven units in a two-block area. The use of tax abatement shall not be utilized for the purpose of converting owner-occupied dwelling units to rental units or for the purpose of further subdivision of rental properties into a larger number of units. However, tax abatement may be used for the conversion of rental units to owner occupancy and/or for the purpose of reducing the number of rental units within a previously converted structure. The Fairmount-Carlisle

Redevelopment Corporation will not assign tax abatement to any proposed project where, upon consideration, the obvious intent is contrary to the intent of the tax abatement incentive as stated above.

IX. Nominal Charges and Fees

The Fairmount-Carlisle Redevelopment Corporation will charge a nominal fee for the processing of a request for the assignment of real estate tax abatement under this program. There is a fee charged by the independent property inspector who is assigned by the Board to conduct preliminary and final inspections. There may be a fee charge for the transfers of the deed. Five-year inspections which fail on external factors may warrant interior inspections for which an independent inspector will charge a fee. Charges may vary from year to year.

X. Application/Approval Process

This describes a typical step-by-step application/approval process for Parcel Specific Tax Abatement.

A. Homeowners Responsibilities

1. The applicant for Parcel Specific Tax Abatement is required to attend an orientation meeting at which:
 - (1) Copies of the Tax Abatement Policies and Guidelines will be provided.
 - (2) Lead-based paint booklets will be provided.
 - (3) A copy of a property evaluation form will be provided.
2. The applicant must identify all elected projects, complete the property evaluation form, and obtain drawings, if necessary, prior to arrival of the inspector.
3. An inspector utilized by the Fairmount-Carlisle Redevelopment Corporation will examine and review the property to identify needed improvements. The inspector will provide the owner of the property with a copy of the required improvements, an estimate of costs, and an indication if permits are required. The City staff at the City of Independence will review this work write-up to verify that the items requiring building permits are indicated.
4. Upon satisfactory completion of the application review, and a determination that the proposed project would be in compliance with the Fairmount-Carlisle Parcel Specific Tax Abatement Guidelines, a commitment for tax abatement is issued in the form of a Memorandum of Understanding by the Fairmount-Carlisle Redevelopment Corporation. For minimum interior and exterior property standards, properties receiving tax abatement must meet and be maintained in compliance with the minimum standards, codes and ordinances of the City. Non-compliance may result in loss of tax abatement.
5. The applicant must apply for all required permits through the City.
6. A Notice to proceed will be issued and rehabilitation construction may begin. Depending on the extent of work to be done, the inspector should provide information to the homeowner as to the length of time to complete the work. A total period of up to three (3) years for full compliance is allowed for substantial rehabilitation.
7. Property owners failing to complete required improvements within the maximum time frame of three (3) years from the "start" date (date of the inspection) must submit a request for extension to the Fairmount-Carlisle Redevelopment Corporation to maintain the abatement. This request must state the reason for the extension, required improvements that remain to be completed, and proposed time frame for completion, not to exceed one year. Failure to complete required improvements within the amended date approved by the Board of Directors will result in removal from the abatement process.
8. When all work is complete in accordance with the approved architectural exhibits and change orders, the applicant provides copies of paid invoices and approved permits (i.e. proof of final inspection from City Building Inspector), to indicate the property is ready for final inspection. A final

inspection will be conducted by a rehabilitation inspector of the City of Independence to certify completion and a Certificate of Compliance will be issued.

B. Corporation Responsibilities

1. The Fairmount-Carlisle Redevelopment Corporation Board of Directors approves each Parcel Specific Tax Abatement Project and the execution of the Missouri Deeds. The owner will deed the property to the Corporation and the Corporation deeds the property thereafter back to the owner. These deeds provide that the Redevelopment Corporation has “ownership” of the parcel for 24 hours so that the Parcel Specific Tax Abatement can “flow through” the corporation to the specific parcel of land.
2. Those filings and recording of the respective deeds will be performed by the staff assigned to the Fairmount-Carlisle Redevelopment Corporation.
3. Upon receipt of the Certificate of Compliance and the signed and notarized Missouri Deed, the Fairmount-Carlisle Redevelopment Corporation will issue a Certificate of Tax Abatement. Copies of these documents are filed with the Director of Assessment, Jackson County, Missouri and the Finance Director, City of Independence, Missouri. The term of the tax abatement shall for 100% for the first 10 years, and 50% abatement for the next 15 years. Abatement runs with the property for the full twenty-five (25) years (except upon cancellation for default of covenants regarding property maintenance and plan compliance) and therefore continues in the event ownership of the property is transferred.
4. The Redevelopment Corporation, will determine the amount of the Base Project minimum requirement (refer to Section IV).
5. The Redevelopment Corporation, in cooperation with the City staff of the City of Independence, reviews applications to determine that:
 - (1) Requirements for the Base Project would be met
 - (2) Other requirements relating to minimum property standards, driveways and off-street parking, landscape, etc. would be met.

All work items that require a building permit will be noted in the work write-up (the City staff at the City of Independence will review the work write-up). Exterior architectural/structural alterations made within one-year prior to the date a property enters the Fairmount-Carlisle Parcel Specific Tax Abatement Program (the “start” date = date of the inspection), or within one-year of the approval process for the Fairmount-Carlisle 353 Redevelopment Plan, shall be considered in the tax abatement review process, and is eligible to submit expenses as verification for meeting the base project requirement.

6. The Redevelopment Corporation, upon request from the homeowner, may provide some direction and advice to low and moderate income applicants as to availability of rehabilitation programs in addition to the tax abatement.

XI. Variances

In the event of practical hardship, the Fairmount-Carlisle Redevelopment Corporation may vary the strict application of these Parcel Specific Tax Abatement Guidelines, provided the general intent and spirit of the Redevelopment Plan is preserved. From time-to-time, the Board may develop other policies regarding variances. These are available on request. Procedural requirements will not be varied without a specific written request to the Fairmount-Carlisle Redevelopment Corporation Board. The request must be considered by the Board and receive an affirmative vote for the variance to be granted. No variances to the Base Project Minimum or those that are not in accordance with the Fairmount-Carlisle 353 Redevelopment Plan will be considered. Also, the Fairmount-Carlisle Redevelopment Corporation has no authority regarding City Code requirements. All projects must comply with City requirements.

XII. Review/Appeals

- A. Review: All completed work will be reviewed by City staff to ensure code compliance and by a representative of the Fairmount-Carlisle Redevelopment Corporation to determine compliance with the Commitment for Tax Abatement prior to granting tax abatement.
- B. Appeals-Tax Abatement: Determinations by the Fairmount-Carlisle Redevelopment Corporation regarding the granting of tax abatement may be appealed to the independence City Council.

XIII. Report to the City Council

The Fairmount-Carlisle Redevelopment Corporation will provide the city Council with a yearly report, which documents all properties granted tax abatement, the value of improvements and all policies and procedures adopted by the Corporation. The report also will indicate the progress toward the stated goals of the Fairmount-Carlisle 353 Redevelopment Plan.

XIV. Periodic Review

The Fairmount-Carlisle Redevelopment Corporation will conduct on-site exterior inspections and may conduct on-site interior inspections every five years after a property has received tax abatement to ensure compliance the guidelines. Properties receiving tax abatement must also be maintained in compliance with the minimum standards, codes, and ordinances of the City. Unresolved code violations or failures to comply with the guidelines may result in repeal of the tax abatement. The Fairmount-Carlisle Redevelopment Corporation can initiate proceedings to revoke tax abatement anytime code violations or noncompliance with these standards are reported as unresolved. Property owners refusing access to their structure for the purpose of Periodic Review inspections shall have the property abatement rescinded.

XV. Definitions

Definitions of terms not defined herein are found in the Fairmount-Carlisle 353 Redevelopment Plan.

Attachment A
City of Independence
ELECTRICAL CODE (MINIMUM STANDARDS)

1. All new or replacement wiring shall be in accordance with the NEC as adopted by the City of Independence, MO. All wiring devices and equipment must be UL approved. Rewiring or new wiring shall be concealed in walls or ceilings where at all possible. Approval of surface mounted wiring must be obtained from the Building Inspection Department.
2. Interior Electrical Service Equipment: Shall be 100 amp breaker type with a minimum of 12 circuit service installation must meet NEC standards of Article 230 and 250.
3. Lighting Fixtures: All lighting fixtures shall consist of a complete fixture including lamps, glassware or globe to provide an operation fixture.
4. Basement & Attic: Existing wiring that has been altered is unsafe or not installed to the NEC shall be required to meet the current NEC. At least one switch shall be provided at the entrance to basement to control a light on the stairs and basement. At least one outlet is required and shall be protected by a ground fault circuit interrupter. Any exposed knob and tube wiring in basement must be replaced to the point of concealment.
5. An Electrical Permit will be required for any and all alterations or additions to the electrical wiring, appliances, equipment or systems associated with the premises electrical wiring. (No permit needed for repairs).

The following are general guidelines and do not limit your responsibility for full compliance with the NEC and other Building Codes.

Each of the following rooms must have at least two (2) non-switched duplex receptacles – living room, family room, dining room and bedrooms.

All bathrooms must have at least one (1) grounded duplex receptacle with ground fault protection.

Each habitable room must have a wall switch controlled light fixture or receptacle.

All hallways and stairs must have wall switch controlled light fixtures.

All entrances or exits must have a wall switch controlled light fixture for exterior lighting.

Kitchens must have two (2) small appliances circuits and be Ground Fault protected per NEC.

Replace any receptacle outlets of old and/or interior design and ground per the NEC.

Smoke detectors will be installed per the International Residential Code. Section R317.

Attachment B**Statement of Labor Provided by Property Owner**

Fairmount/Carlisle 353 Redevelopment Plan

Tax Abatement Program

Property Address: _____

Owner Name: _____

Owner Address (if different): _____

Trade	Hourly Rate	Total Hours	Total Value (hrs x \$)
Roofing	\$30.25		
Painting	\$17.70		
Wallpapering	\$28.09		
Carpentry	\$25.66		
Plumbing	\$35.13		
Electrical	\$20.78		
HVAC	\$18.77		
Carpet laying/flooring	\$29.00		
Sidewalk/driveway	\$23.13		
Sheetrock/Plaster	\$28.58		

(Amounts provided from Davis-Bacon Pay Scale, for Jackson County metro area, September 2008)

The labor costs above represent hours applied toward completion of the tax abatement requirements of the Fairmount-Carlisle 353 Redevelopment Plan.

Signed: _____

Date: _____

Approved: _____

Date: _____

This document shall be retained by the Fairmount-Carlisle 353 Redevelopment Plan for a period of 25 years. The property owner is responsible for keeping a copy of this Statement of Labor Costs as well as all related tax abatement documents for 25 years. In the event of sale of the property, the above mentioned documents shall be transferred to the new owner for retention throughout the tax abatement period.

(Updated September 2008)