CITY OF NEW ORLEANS
Restoration Tax Abatement Program
Checklist of Required Documents for Local Submission

(Initial Application)

RTA #:_____ Address:_____
Council District:_____ Qualifying District:_____

In order to process your application for review, the Mayor's Office of Economic Development must receive the following items:

☐ 1. **Affidavit**: A notarized affidavit as to whether the principals in the project would have proceeded with the rehabilitation without the tax benefit of Act 445 of 1983

☐ 2. **Description of Restoration**: Describe in *written detail* the nature and extent of physical damage to the property for which the tax abatement is requested (i.e. blighted, gutted, etc.), the proposed renovations, and intended property use.

☐ 3. **Investment Total**: Costs incurred during construction. Complete the "RTA Project Cost Reporting Form" provided. This form will disclose an itemized breakdown of all improvements; including their respective costs. *NOTE: The total direct project value reflects ONLY materials, machinery/equipment, and labor/engineering.*

☐ 4. **Before & After Comprehensive Appraisal Report**: An "*as is*" appraisal of the value of the land and improvements *before* rehabilitation as well as an "*as renovated*" appraisal of the proposed improvements *after* construction by a duly qualified real estate appraiser

☐ **5. Pro Forma**: For "*income producing properties*" only, submit a pro forma statement based on a five-year projection relating to the proposed rehabilitation work. This financial projection should include expected revenues, expenses and debts of the project.

☐ 6. **Cost/Benefit Analysis**: For "*sales tax generated projects*" only, submit a C.B.A. that will weigh the total expected costs versus benefits to determine the best profitable option.

☐ 7. **Eligibility Certification Form**: Verify eligibility

☐ 8. **Property Taxes**: Submit *Tax Invoice* from the Bureau of Treasury and *Building Assessment Value* from the Assessor's Office (website) for the year prior to project commencement. If property taxes are currently delinquent, please explain.

☐ 9. **Building Permit Job Value Verification**: Provide copies of any and all permits associated with the proposed scope of work, including the total project job value amount reported to Safety and Permits. "*Permit Job Value*" (*including materials, equipment, and labor*) is the total value of all construction work, as well as finish work, painting, roofing, electrical, plumbing, heating, air conditioning, elevators, fire extinguishing systems and other permanent equipment for which the permit is issued.

☐ 10. **DBE Compliance Verification:** Pursuant to Code of the City of New Orleans §70-459, there is a "35% DBE participation goal" for all public spending or private projects that utilize public funding and/or incentives. No RTA shall be approved for projects that are not compliant with the local DBE requirements for attainment of the DBE goal and/or demonstration of Good Faith Efforts to attain the DBE goal. This ordinance applies to both commercial projects and residential projects with more than 6 units. Provide the following evidence of DBE compliance for OSD review: DBE Responsiveness Form (*DBE Compliance Form 1*) which details attainment of the DBE goal through contract commitments to certified DBE firms; and/or in the event that the applicant cannot meet the DBE goal, a signed Good Faith Efforts Form (*DBE Compliance Form 2*) which demonstrates Good Faith Efforts to attain the DBE goal must also be submitted. The DBE Utilization Report (*DBE Compliance Form 3*) or electronic reporting via the B2G Now Compliance Monitoring system which details all DBE firms that were utilized on the project and the payments made to each firm must be submitted on a monthly basis. DBE Compliance Forms 1 and 2 as applicable must be submitted to the Office of Supplier Diversity prior to the

start of construction in order for the project to qualify for this program. For DBE Program assistance, contact Office of Supplier Diversity at 658-4200.

☐ 11. **Hire NOLA & Living Wage Compliance Verification**: Pursuant to Code of the City of New Orleans §70-499, the Hire NOLA program links quality employment opportunities created by City construction contracts and economic development projects worth more than $150,000 with Local and Disadvantaged Local Workers. This program establishes a First Source requirement and Good Faith Effort Participation Goals. Pursuant to Code of the City of New Orleans §70-806, §70-807 and §70-808, the Living Wage Ordinance requires covered employers to pay no less than the living wage for all hours worked, provide compensated leave to employees and prohibits wage reduction retaliation based on ordinance. Provide the following documentation for OWD review: Hire NOLA & Living Wage bidder attestation and good faith efforts form, Local-Hire Plan, and Manpower Utilization Schedule. For assistance, contact Office of Workforce Development at 658-4500.

☐ 12. **Photos:** Provide *Before* and *After* pictures that exhibit the overall restoration. Photos must be submitted in a hard copy word format on letter size paper.

The Restoration Tax Abatement Program is administered by Louisiana Economic Development through the Board of Commerce & Industry.
For information regarding local requirements, please contact Tracey Jackson, Mayor's Office of Economic Development, at 504.658.4955.

CONTACT INFO:

For inquiries regarding state filings (advance note/ application/ etc.):
Becky Lambert
Program Administrator, Restoration Tax Abatement
Louisiana Economic Development
617 North 3rd Street| Suite 1800 | Baton Rouge, LA 70802-5239
E-Mail: Becky.Lambert@LA.GOV
Office: 225.342.6070
To apply: https://fastlane.louisianaeconomicdevelopment.com/

For inquiries regarding your DBE Participation Plan:
Sonia Oliva
Compliance Officer
Office of Supplier Diversity
1340 Poydras Street | Suite 1800 | New Orleans, LA 70112
E-Mail: saoliva@nola.gov
Office: 504.658.4275
DBE Directory: https://neworleans.dbesystem.com/FrontEnd/VendorSearchPublic.asp?TN=neworleans&XID=5545

For inquiries regarding Hire NOLA and Living Wage:
Brandi Ebanks
Policy & Program Manager
Mayor's Office of Workforce Development | City of New Orleans
3400 Tulane Avenue | New Orleans, LA 70119
Office: 504.658.4545
E-Mail: bnebanks@nola.gov

For inquiries regarding tax bill:
Office of Treasury
City of New Orleans
1300 Perdido Street | City Hall | Room 1W40 | New Orleans, LA 70112
Room 1W40 | New Orleans, LA 70112
New Orleans, LA 70112
Office: 504.658.1701
Fax: 504.658.1704