

✓ CHECK LIST FOR MUNICIPAL TIF PROGRAM APPLICATIONS

Edited Development Program *inclusive of all exhibits* must be available to the public on date of notice publication.

APPLICATION REQUIREMENTS	TECHNICAL REVISION TRIGGERS
1. Applications consist of a single <u>hard-copy original</u> with A-Z tabs for exhibits. A <u>table of contents</u> must reference statutory requirements/exhibits. <i>Downtown designation</i> applications must arrive with original plus 2 copies; <i>Transit-Oriented Development (TOD)</i> designation applications with original plus 1 copy;	<ul style="list-style-type: none"> ▪ A Table of Contents that lacks statutory requirements or list of exhibits. ▪ Lack of A-Z tabs for exhibits. ▪ Lack of applicable copies if Downtown and/or TOD designation(s).
2. A downtown revitalization plan <u>previously approved by legislative body</u> is a required exhibit for all Downtown designation applications. For this requirement comprehensive plans <u>are unacceptable</u> and will trigger conditional approvals;	<ul style="list-style-type: none"> ▪ Please exclude “Downtown” from the name of any district <u>not</u> seeking downtown designation.
3. TOD designation requires a map that identifies transit facilities plus areas and corridors respective of § 5222 (20)(22)(23);	<ul style="list-style-type: none"> ▪ Lack of map exhibit that identifies TOD areas and corridors.
4. The cover letter from <u>authorized municipal official</u> is to be addressed to Commissioner and include the words, “I certify and attest...;” “...true and correct to the best of my knowledge;”	<ul style="list-style-type: none"> ▪ Use of, “We” instead of “I.” ▪ Letter signed by economic development director. ▪ Lack of original signed letter.
5. Commissioner <u>does not</u> preview/file copies. Please address letter to Commissioner, but <u>mail to the attention of</u> Program Director;	
6. A completed <u>Application Cover Sheet</u> Form is required. This is to include company/developer data if reimbursement agreement (CEA/other) is proposed;	<ul style="list-style-type: none"> ▪ Lack of completed Form.
7. A completed <u>Employment Goals</u> Form is required whenever a <u>company</u> is part of proposal (CEA or not)—if <u>developer</u> please SKIP Form altogether;	<ul style="list-style-type: none"> ▪ Lack of completed Form. ▪ Jobs/Salaries data inconsistent w/Program narrative.
8. A completed <u>Statutory Requirements and Thresholds</u> Form is required for all applications. Lines A-7 and B-3 must call out existing/proposed districts <i>by individual name on file with Department and respective acreage/OAV</i> —please edit first column to suit/fit. Line A-7 must include any Affordable Housing TIF districts. Lines A-9 and B-5 should include PTDZ acreage <u>only when this is both (a)</u> approved through and up to 12/31/08 and <u>(b)</u> common to other Municipal TIF districts;	<ul style="list-style-type: none"> ▪ Use of district <i>local nicknames</i> in Lines A-7/B-3. ▪ Data inconsistent w/Program narrative or any exhibit such as District Map and Assessor Certificate. ▪ PTDZ acreage exemption in Lines A-9/B-5 is neither grand-fathered <i>nor</i> overlaps Municipal TIF districts. ▪ Inventory discrepancies regarding expired or terminated districts. ▪ Lack of <i>comprehensive</i> data on amendment applications. ▪ Lack of expiration/termination letters in Department file(s).
9. PRIVATE facilities/projects;	<ul style="list-style-type: none"> ▪ Development Program must address either way.
10. PUBLIC activities/projects Table with cost estimates and statutory citations with <u>sum total row</u> and <u>footnotes</u> for any activities/projects common to other districts. Activities/projects in Table are preferred sorted by inside district; outside district and throughout municipality. <i>Please remove all public projects/activities lists from Program narrative;</i>	<ul style="list-style-type: none"> ▪ Lack of specifics such <i>sample</i> projects. ▪ Inclusion of unallowable project costs such as residential components, senior centers, libraries, parks, fountains and community events. ▪ Reference to support for economic development department lacks “salaries” and/or “operations,” if applicable. ▪ References to administrative/organizational costs lack “<i>prorated municipal salaries,</i>” if applicable. ▪ Lack of identification of projects common to other municipal TIF districts/programs. ▪ Lack of total sum row at end of Table.
11. Public indebtedness;	<ul style="list-style-type: none"> ▪ Development Program must address either way.
12. Publication proof of 10-day notice of public hearing— <i>please send photocopy only;</i>	<ul style="list-style-type: none"> ▪ Illegible photocopy. ▪ Photocopy lacks folio.
13. Attested Minutes;	<ul style="list-style-type: none"> ▪ Signed Minutes that lack date of signature. ▪ Lack of original signed Minutes.
14. Legislative body order/vote;	<ul style="list-style-type: none"> ▪ Council order should include vote tally.

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15. Duration of District term with specific start/end dates;	<ul style="list-style-type: none"> ▪ Lack of specific term start/end dates. ▪ Date range inconsistent w/Program narrative or exhibits including pro forma, Tax Shifts and Assessor Certificate.
16. Assessor Certificate with "...taxable" original assessed value (OAV) of "...real" and/or "...personal" property as of "...March 31, 2015 (April 1, 2014)..." in top paragraph, with table rows/columns for company/developer property OAV if any, plus call callout of any BETE property present in district but excluded from OAV;	<ul style="list-style-type: none"> ▪ Top paragraph lacks "taxable." ▪ Top paragraph lacks "real" and/or "personal." ▪ OAV dates are inconsistent w/Program narrative. ▪ Lack of <u>either</u> March 31 or April 1. ▪ Data inconsistent w/Program narrative or other exhibits, such as Stats/Reqs Form or District Map. ▪ Lack of original signed certificate. ▪ Lack of <i>comprehensive</i> certificate that references any/all previous amendments.
17. Locational map placing District in context within municipal borders;	<ul style="list-style-type: none"> ▪ Lack of map. ▪ Map lacks view of entire municipality. ▪ Map lacks correct District name to match application.
18. Tax maps w/lot numbers for entire District footprint, except with Downtown designation applications in which case Department will accept detailed property list as addendum to Assessor Certificate.	<ul style="list-style-type: none"> ▪ Map lacks tax map/lot numbers. Only exception is downtown designation districts application, which may include <u>detailed list</u> as addendum to Assessor Certificate. ▪ Map is illegible. ▪ Map legend is inconsistent with Program narrative or other exhibits, such as Assessor Certificate or Stats/Reqs Form. ▪ Legend colors do not match Map colors. ▪ Black & White submission of color map. ▪ Map lacks correct District name to match application.
19. Anticipated revenues source(s);	<ul style="list-style-type: none"> ▪ Paragraph addresses <u>PRIVATE</u> but lacks source of <u>PUBLIC</u> revenue source(s).
20. Agreements/Contracts terms/conditions. For this requirement lack of XX% <u>is unacceptable</u> and will trigger conditional approval. <i>The Department does not need to see draft CEAs nor will review same as we do not provide legal advice;</i>	<ul style="list-style-type: none"> ▪ Municipalities seeking Omnibus capacity for any district must <u>specify</u> maximum reimbursement percentage within sole Council or Board of Selectmen (BOS) discretion, i.e.: "...up to 75% company or developer reimbursement within sole BOS discretion..." and include any other desired local triggers/caps. ▪ A development program that references a municipal TIF policy must include this as an exhibit.
21. Revenue spreadsheet, i.e.: <i>pro forma</i> —including annual increased assessed value projections, annual tax increment, annual capture percentages and dollar projections; company/developer allocation(s) if any—ending with rows for annual average and aggregate total;	<ul style="list-style-type: none"> ▪ Date range inconsistent w/Program narrative or exhibits including pro forma and Assessor Certificate. ▪ Lack of GF Column when capture less than 100%. ▪ Allocation columns that do not add up or are inconsistent w/Program narrative. ▪ Improperly labeled columns. ▪ Lack of <i>actual-to-date</i> on pro forma for any district 10 years-old and older <u>OR</u> for a district that has had three or more amendments.
22. <u>Annual</u> tax shift calculations with explanatory <i>best-practice</i> footnote;	<ul style="list-style-type: none"> ▪ Date range inconsistent w/Program narrative or exhibits including pro forma and Assessor Certificate.
23. Displaced persons relocation plans.	<ul style="list-style-type: none"> ▪ Lack of any of these requirements will trigger <u>conditional</u> approval.
24. Environmental controls.	
25. Proposed operation post-capital improvements.	
26. Regulations/Facilities to improve transportation.	
27. The following constitutes <i>best practice</i> on amendments: (a) Applicant includes one <u>mark-up copy</u> with application; (b) Development Program narrative updates public on status of public indebtedness if any; and (c) Table of public projects is <i>comprehensive</i> and updates public on status of all activities.	<ul style="list-style-type: none"> ▪ Lack of existing reimbursement agreement(s) or assignment(s) on file, copies of which are due Department <u>upon execution</u> along with corresponding completed Cover Sheet and Employment Goals forms—the latter only if company(ies) and <i>not</i> for developer(s).