# RESTORATION TAX ABATEMENT PROGRAM CITY OF NEW ORLEANS

### Your guide to local submission.

This information is designed to help advise homeowners and commercial owners of the exhibits required for local tax abatement review and consideration under *RTA Guidelines Resolution No. R-25-274*.

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# CITY OF NEW ORLEANS Restoration Tax Abatement Program <u>Requested Documents for Local Submission</u>

RTA Application #:\_\_\_\_\_

Property Address:

Council District:

Pursuant to the New Orleans City Council's **RTA Guidelines Resolution No. R-25-274**, the following "applicable" exhibits must be submitted to the Office of Economic Development for local RTA processing. See applicability listed below for each requested item based on project status; residential or commercial project, and original, renewal or transfer application. All *intake forms\** may be found enclosed. Check boxes of all exhibits that apply and submit the required documentation via email to the Office of Economic Development's Program Manager, Tracey Jackson, at tmjackson@nola.gov.

DOCUMENT CHECKLIST				
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.				
Applicable to:           Residential         Commercial         Original         Renewal         Transfer				
DESCRIPTION OF PROJECT: Describe in written detail the nature and extent of project for which the abatement is requested and will return a blighted or underused property, to construction, he and/or making purchases toward the project's capital investment, and intended property use.				
Applicable to:				
Residential Commercial Original Renewal Transfer				
INVESTMENT BREAKDOWN TOTAL*: For "construction projects" only, submit breakdown of           construction costs. Complete the "RTA Project Cost Reporting Form" provided. This form will discle an itemized breakdown of all capital additions and improvements.	se			
Applicable to:				
Residential Commercial Original Renewal Transfer				
BEFORE & AFTER COMPREHENSIVE APPRAISAL REPORT: An "as is" appraisal of the value of the land improvements <u>before</u> rehabilitation as well as an "as renovated" appraisal of the proposed improvem <u>after</u> construction by a duly qualified real estate appraiser. Applicable to:				
Residential Commercial Original <del>Renewal</del> Transfer				
revenues, expenses, and debts of the project.         Applicable to:         Residential       Commercial       Original       Renewal       Transfer         COST/BENEFIT ANALYSIS*: Submit C.B.A that will weigh the total expected costs (local tax incention)	ntive			
value) versus benefits (projected ad valorem revenue) to determine incentive viability.				
Applicable to:				
Residential Commercial Original Renewal Transfer				
ELIGIBILITY CERTIFICATION FORM*: Verify project eligibility.				
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Applicable to:           Applicable to:           Residential         Commercial         Original         Renewal         Transfer				
Residential         Commercial         Original         Renewal         Transfer           PROPERTY TAX INFORMATION:         Submit Tax Invoice from the Bureau of Treasury and Bull         Assessment Value from the Assessor's Office (website) for the year prior to put commencement. If property taxes are currently delinquent, please explain.	ilding oject			
Residential         Commercial         Original         Renewal         Transfer           PROPERTY TAX INFORMATION:         Submit Tax Invoice from the Bureau of Treasury and Build Assessment Value from the Assessor's Office (website) for the year prior to prior         Invoice from the Assessor's Office (website)         Invoice from the Value from the Assessor's Office (website)         Invoice from the Value from the Assessor's Office (website)         Invoice from the Value from the Value from the Assessor's Office (website)         Invoice from the Value from	-			
Residential         Commercial         Original         Renewal         Transfer           PROPERTY TAX INFORMATION:         Submit Tax Invoice from the Bureau of Treasury and Bu.         Assessment Value from the Assessor's Office (website) for the year prior to provide the property taxes are currently delinquent, please explain.         Applicable to:	mits.			

DBE COMPLIANCE	VERIFICATION*: Purs	uant to Code of the Cit	y 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	for attainment of the DBE goal and/or demonstration of Good Faith Efforts to attain the DBE goal. This				
ordinance applies to all public spending and private projects with the exception of owner-occupied					
residential projects with 6 or less units and projects valued less than \$15,000 (§70-466(E)(5)). Provide					
the following evidence of DBE compliance for OSD review: DBE Responsiveness Form (DBE Compliance					
Form 1) which det	ails attainment of the	DBE goal through con	tract commitmen	ts to certified DBE firms;	
and/or in the even	it that the applicant c	annot meet the DBE go	oal, a signed Good	Faith Efforts Form (DBE	
Compliance Form	2) which demonstra	ates Good Faith Effor	ts to attain the	DBE goal must also be	
submitted. Also, e	lectronic reporting via	a the B2G Now Compl	ance Monitoring	system which details all	
DBE firms that wer	re utilized on the proje	ect and the payments r	nade to each firm	must be submitted on a	
monthly basis. DB	E Compliance Forms	1 and 2 as applicable m	ust be submitted	to the Office of Supplier	
Diversity prior to t	he start of constructi	on in order for the pro	pject to qualify for	r this program. For DBE	
Program assistance	e, contact Office of Su	pplier Diversity at 658	-4200.		
 		Applicable to:			
Residential	Commercial	Original	Renewal	Transfer	
HIRE NOLA & LIVI	NG WAGE COMPLIAN	CE VERIFICATION*: Pu	rsuant to Code of	the City of New Orleans	
§70-499, the Hire	NOLA program links	quality employment o	pportunities crea	ted by City construction	
contracts and ecor	nomic development p	rojects worth more that	ın \$150,000 with I	ocal and Disadvantaged	
Local Workers. Th	is program establishe	s a First Source require	ement and Good I	aith Effort Participation	
Goals. Pursuant t	o Code of the City of	New Orleans §70-80	5, §70-807 and §7	70-808, the Living Wage	
Ordinance require	s covered employers	to pay no less than the	living wage for a	ll hours worked, provide	
compensated leav	e to employees and p	rohibits wage reductio	n retaliation base	d on ordinance. Provide	
the following docu	umentation for OWD	review: <u>Hire NOLA &amp;</u>	Living Wage bidd	er attestation and good	
faith efforts form,	Local-Hire Plan, and I	Manpower Utilization S	Schedule. For assis	stance, contact Office of	
Workforce Develo	pment at 658-4500.				
 		Applicable to:		-	
Residential	Commercial	Original	Renewal	Transfer	
PHOTOS: (applicat	ple to construction pro	ojects ONLY): Provide	pre-construction a	and current building	
		ojects ONLY): Provide   on (interior and exteri		and current building	
photos that exhibi	t the overall restorati	on (interior and exterion Applicable to:	or).		
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**TRANSFERABLE ELIGIBILITY**: If property subject to restoration tax abatement is sold or transferred, the exemption may be transferred for the remainder of its term to the new owner, provided such transfer is approved by the Council. Any transfer shall require the transferee to assume all of the transferor's duties, obligations, and liabilities relative to the restoration tax abatement. A transferred restoration tax abatement shall not be eligible for renewal. Each application for RTA transfer shall be submitted to the OED on forms prepared by the office, together with any documents the OED reasonably require (such as Recorded Act of Sale or Hotel Management Agreement). A RTA for property subject toa condominium declaration may not be transferred.

Applicable to:				
Residential Commercial Original <del>Renewal</del> Transfer				

#### OTHER INFORMATION REQUESTED FOR OED REVIEW Provide the following information in a separate attachment.

Explain the extent to which project improvements will upgrade the usefulness of the property or preserve it in a manner that significantly improves its condition for a period of no less than 20 years.

Explain the extent to which project improvements are architecturally and historically appropriate and will not negatively affect the historic character of surrounding neighborhood.

Explain the extent to which project improvements will result in other economic or social benefits to the city that outweigh the foregone tax revenue over the useful life of the improvements and thereafter.

CONTACT INFO:		
For inquiries regarding state filings	For inquiries regarding your DBE Participation Plan:	
(advance note/ application/ etc.):	Justin Nwokolo	
Travis Rosenberg	Compliance Officer	
Program Administrator, Restoration Tax Abatement	Office of Supplier Diversity	
Louisiana Economic Development	1340 Poydras Street   Suite 1800	
617 North 3rd Street   Suite 1800   Baton Rouge, LA 70802-5239	New Orleans, LA 70112	
E-Mail: Travis.Rosenberg@LA.GOV	E-Mail: Justin.Nwokolo@nola.gov	
Office: 225.342.4710	Office: 504.658.4281/ Cell: 504.816.0974	
To apply: https://fastlane.louisianaeconomicdevelopment.com/		
For inquiries regarding	For inquiries regarding	
Hire NOLA and Living Wage:	<u>tax bill</u> :	
Tremon Tapp	Office of Treasury	
Hire NOLA Workforce Coordinator	City of New Orleans	
Mayor's Office of Workforce Development   City of New Orleans	1300 Perdido Street   City Hall   Room 1W40	
3400 Tulane Avenue   New Orleans, LA 70112	New Orleans, LA 70112	
Office: 504. 658.4523	Office: 504.658.1701	
E-Mail: tremon.tapp@nola.gov	Fax: 504.658.1704	

#### LOCAL SUBMISSION INSTRUCTIONS:

All required project documentation must be submitted to the Office of Economic Development electronically via email to Tracey Jackson Bush at tmjackson@nola.gov for local review and consideration. Each exhibit file submitted from the above checklist must be labeled with the corresponding title and project address (i.e.: "Affidavit \_ 123 Rita Lane"). See RTA meeting calendar for submission deadlines.

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 Bush, Mayor's Office of Economic Development, at 504.658.4955.

### OFFICE OF ECONOMIC DEVELOPMENT CITY OF NEW ORLEANS <u>AFFIDAVIT</u> (ORIGINAL APPLICATION)

STATE OF LOUISIANA PARISH OF ORLEANS

BEFORE ME, the undersigned authority, duly commissioned and qualified within and for the state and parish aforesaid, personally came and appeared \_\_\_\_\_\_, who being by me first duly sworn deposed and said:

"That affiant has made or caused to be made an application for property tax abatement for property located at \_\_\_\_\_\_, State Application Number \_\_\_\_\_.

Affiant would not have purchased or proceeded with the purchase of the above identified property but for the benefits or the Restoration Tax Abatement Program. Affiant is a principal party to the project and understands that all principal parties involved in the project must submit an affidavit in connection with the application under the Restoration Tax Abatement Program indicating whether or not the purchase of the property would have been undertaken had it not been for the availability of the benefits of the Restoration Tax Abatement Program."

Signature

Sworn to and subscribed before me this

NOTARY PUBLIC

WITNESSES:



#### STATE OF LOUISIANA PARISH OF ORLEANS

BEFORE ME, the undersigned authority, duly commissioned and qualified within and for the state and parish aforesaid, personally came and appeared \_\_\_\_\_\_, who being by me first duly sworn deposed and said:

"That affiant has purchased a property located at \_\_\_\_\_\_ which presently has a contract in the Restoration Tax Abatement (R.T.A.) program; State Application Number \_\_\_\_\_.

Affiant has filed for renewal of the Restoration Tax Abatement (RTA) Contract. Affiant would not have proceeded with additional renovations of the above identified property but for the benefits or the Restoration Tax Abatement Program. Affiant is a principal party to the project and understands that all principal parties involved in the project must submit an affidavit in connection with the application under the Restoration Tax Abatement Program indicating whether or not an additional renovation of the property would have been undertaken had it not been for the availability of the benefits of the Restoration Tax Abatement Program."

Affiant certifies that the amount of Cash Equity contributed to the referenced project to date is

Signature

Sworn to and subscribed before me this \_\_\_\_\_

NOTARY PUBLIC

WITNESSES:



#### STATE OF LOUISIANA PARISH OF ORLEANS

BEFORE ME, the undersigned authority, duly commissioned and qualified within and for the state and parish aforesaid, personally came and appeared \_\_\_\_\_\_, who being by me first duly sworn deposed and said:

"That affiant has purchased a property located at \_\_\_\_\_\_, via transfer from a contract in the Restoration Tax Abatement (R.T.A.) program. State Application Number \_\_\_\_\_.

Affiant has filed for transfer of the Restoration Tax Abatement (RTA) Contract. Affiant would not have purchased or proceeded with the purchase of the above identified property but for the benefits or the Restoration Tax Abatement Program. Affiant is a principal party to the project and understands that all principal parties involved in the project must submit an affidavit in connection with the application under the Restoration Tax Abatement Program indicating whether or not the purchase of the property would have been undertaken had it not been for the availability of the benefits of the Restoration Tax Abatement Program."

Affiant certifies that the amount of Cash Equity contributed to the referenced project to date is

Signature

Sworn to and subscribed before me this \_\_\_\_\_

NOTARY PUBLIC

WITNESSES:

OFFICE OF ECONOMIC DEVELOPMENT

**CITY OF NEW ORLEANS** 

# **PROJECT COST REPORTING FORM**

(Investment Breakdown Total of Original and Renewal Projects)

RTA Application #: Property Address:

Eligible Investment Costs as defined by LED

# **ITEMIZED RTA INVESTMENT COSTS BUILDING & MATERIALS** i.e.: Doors, HVAC (permanent), Building Insulation, Roof TOTAL BUILDING & MATERIALS COSTS **MACHINERY & EQUIPMENT** *i.e.: Crane /Lift Equipment Rental* TOTAL MACHINERY & EQUIPMENT COSTS LABOR i.e.: Electrical, Plumbing, Mechanical TOTAL LABOR COSTS **BUILDING PERMIT JOB VALUE CONSTRUCTION HARD COSTS REPORTED TO SAFETY & PERMITS** (Materials, Machinery/Equipment, and Labor costs requiring permit) ENGINEERING i.e: Insurance, Architecture Fees, Permitting TOTAL ENGINEERING COSTS **INVESTMENT TOTAL** ELIGIBLE FOR TAX ABATEMENT (Materials, Machinery/Equipment, Labor, and Engineering)

Attach copies of all <u>permits</u> along with an <u>itemized breakdown</u> of all eligible RTA investment costs (Materials, Permanent Fixtures, Labor, and Engineering/ Overhead Costs)

OFFICE OF ECONOMIC DEVELOPMENT

**CITY OF NEW ORLEANS** 

# **COST/BENEFIT ANALYSIS FORM**

(Applicable to Original/Revenue Generating Projects)

### **INFORMATION ABOUT YOUR BUSINESS**

APPLICATION #	
<b><u>COMPANY OR PROPERTY OWNER'S NAME</u></b> Name of your company or property owner's name as provided to the State on the Application Form	
<b>PROPERTY ADDRESS</b> Address of the physical location of the property	
LIST OF PRINCIPALS List of principal owners of the property	
CURRENT OR PRIOR USE Use of property prior to improvements	
PROPOSED USE Proposed use of the property	
CONTACT NAME Business contact	
CONTACT NUMBER Business's telephone number	

# **EMPLOYMENT DATA**

EMPLOYEES	ORLEANS PARISH	NON-ORLEANS PARISH
TOTAL NUMBER OF CURRENT YEAR EMPLOYEES PRIOR TO CONSTRUCTION Total number of current employees (year prior to construction) who are Orleans Parish residents and total number of employees residing in other parishes/countries other than Orleans	#	#
PROJECTED NUMBER OF NEW EMPLOYEES AFTER CONSTRUCTION Number of projected <u>new</u> employees to be created through your business's construction project who are Orleans Parish residents and the number of projected <u>new</u> employees residing in parishes/counties other than Orleans	#	#
<b>CURRENT PAYROLL (PRE-CONSTRUCTION)</b> Dollar amount in annual payroll paid to current employees who are Orleans Parish residents and to current employees residing in parishes/counties other than Orleans.	\$	\$

#### PROJECTED PAYROLL INCLUDING NEW HIRES (POST-CONSTRUCTION)

Total dollar amount of the annual payroll to be paid to new and current employees who are Orleans Parish residents and for those new and current employees residing in parishes/counties other than Orleans.

\$	\$
----	----

# INFORMATION FOR TAX EXEMPTION

DESCRIPTION OF PROJECT Briefly describe your project	
BUILDING PERMIT FEES Dollar amount paid to the City of New Orleans for your building permit	\$
OCCUPATIONAL LICENSE Dollar amount paid to the City of New Orleans for your business's occupational license	\$
OTHER FEES Other fees paid due to the project	\$
PRE-DEVELOPMENT ASSESSED VALUE OF BUILDING/IMPROVEMENTS "Building Value" of your property the year prior to construction as reported by the Assessor's Office	\$
POST-DEVELOPMENT ASSESSED VALUE OF BUILDING/IMPROVEMENTS "Building Value" of your property post construction as reported by the Assessor's Office	\$
REAL ESTATE TAXES PAID FOR CURRENTYEAR PRIOR TO CONSTRUCTIONAmount of property taxes paid the current year prior to construction on this property (land and improvements)	\$

ANNUAL SALES <u>ORLEANS PARISH TAXABLE SALES</u> Amount of Orleans Parish taxable sales for the year prior to construction and the projected sales (post construction) for each category to be generated due to the project expansion	YEAR PRIOR TO CONSTRUCTION	PROJECTED (AFTER CONSTRUCTION)
RETAIL	\$	\$
WHOLESALE	\$	\$
ROOM NIGHT SALES (HOTEL/MOTEL)	\$	\$
OTHER TAXABLE SALES i.e.: labor charges on appliances and small engine repairs, etc.	\$	\$
TOTAL GROSS TAXABLE SALES Sum of all itemized taxable sales (retail, wholesale, hotel/motel room, and other)	\$	\$
NON-TAXABLE SALES i.e.: membership service fees, etc.	\$	\$

<b>CONSTRUCTION COSTS</b> Dollar amount of costs associated with your company's construction/expansion plans.	<u>PURCHASED</u> <u>WITHIN</u> <u>ORLEANS</u> <u>PARISH</u>	PURCHASED OUTSIDE OF ORLEANS PARISH delivered to your business by a supplier located out of Orleans Parish	PURCHASED OUTSIDE OF ORLEANS PARISH purchased from a supplier outside of Orleans Parish and physically delivered by your business to its own location	TOTAL
COST OF EQUIPMENT AND MACHINERY	\$	\$	\$	\$
COST OF MATERIALS AND SUPPLIES	\$	\$	\$	\$
COST OF LABOR / CONSTRUCTION PAYROLL	\$	\$	\$	\$
COST OF ENGINEERING Professional Services	\$	\$	\$	\$
OTHER* (list below)	\$	\$	\$	\$
<b>TOTAL CONSTRUCTION COSTS</b> Sum of all itemized construction costs (equipment/machinery, materials/supplies, construction payroll, and engineering costs)	\$	\$	\$	\$
# OF CONSTRUCTION JOBS				

ANNUAL UTILITY COSTS	YEAR PRIOR TO CONSTRUCTION	PROJECTED (AFTER CONSTRUCTION)
ESTIMATED ELECTRIC COST	\$	\$
ESTIMATED NATURAL GAS	\$	\$

# OTHER\*

Please supply other pertinent information below (including other construction costs)

# CERTIFICATION

Please fill in, sign, and have notarized

BEFORE ME, the undersigned authority, personally came and appeared

(First & Last Name) who duly sworn did depose and

say: That he/she is

That this affidavit is made for the specific purpose of verifying that he has examined the information contained on the found the pages of this form and information given to be true and correct.

Sworn to and subscribed before me this date;

Notary By

For all inquiries regarding this form, please contact Tracey Jackson, RTA Program Manager, at tmjackson@nola.gov.

#### CITY OF NEW ORLEANS MAYOR'S OFFICE OF ECONOMIC DEVELOPMENT

# LOUISIANA RESTORATION TAX ABATEMENT PROGRAM <u>ELIGIBILITY CERTIFICATION FORM</u>

A <u>Restoration Tax Abatement Application</u> has been filed with the Louisiana Department of Economic Development (LED) for limited tax exemption of the below-described property. Said limited tax exemption will be for an initial fiveyear period as provided by Louisiana Restoration Tax Abatement Act R.S. 47:4311 – R.S. 47:4319 and the Louisiana Constitution.

#### PROPERTY INFORMATION

RTA Application #:		
Company or Owner(s) Name:		
Project Address:		
Lot #:		
Is the property located in a qualifying area? Yes $\Box$ No $\Box$ If Yes, what is the name of the qualifying location?		
What is the ownership structure? Sole Ownership		
Is the proposed use of the property short term rental? Yes $\Box$ No $\Box$		
Is the subject property utilized for commercial use or owner-occupied residential use? Yes $\square$ No $\square$		
If <u>commercial</u> , how is the property defined according to the Comprehensive Zoning Ordinance use tables (see <u>Property Viewer</u> ) <u>or</u> Is it a residential property with 4 or more units (applies ONLY to residential properties filed <i>on or after 5/22/25</i> )?		

If <u>owner-occupied</u>, is this a less than 4-unit structure occupied by the owner that is used principally for residential use (inquiry applicable ONLY to projects filed under the R-25-274 Rules)? Yes  $\Box$  No  $\Box$ 

For ownership verification, 1 of the following documents is requested to confirm owner occupancy:

- $\circ$  a valid homestead exemption or other residency document  $\Box$ ,
- $\circ$  proof of legal agreement or contract granting *usufruct of the property*  $\Box$ , or
- $\circ$  at least 20% in juridical ownership  $\Box$

#### PROPERTY OWNER INFORMATION

Project Contact Person:	Title:
Project Contact Address:	
Telephone #:	Email #:

List all property owners involved in the project (provide attachment if additional space is needed):		

#### PROPERTY TAX INFORMATION

Tax Year Prior to Construction:	Tax Bill #   Year Prior to Construction:
Current assessed value of property to be considered	for tax abatement: \$
Amount of Ad Valorem Taxes paid on this property fo	r the year before construction: \$
What is the pre-improved assessment value?	
Does the investment total meet the 25% minimum pre-	e-improved assessment value required? Yes $\Box$ No $\Box$

Have all outstanding property taxes been paid (if not, explain)? Yes □ No □

Have any protest payments been made on the improvements portion of taxes subject to abatement request? Yes 
No 
If so, what tax years?

#### PROJECT INFORMATION

Number of Units:	Existing Square Footage:	Added Squa	are Footage	e:	
Prior Use of Property:	Multifamily	Office $\Box$	Retail 🗆	Other:	
Project Start Date:	Project Completion Date:		_		

Proposed use of property after restoration:

Will the proposed project and improvements extend the useful life of the building for at least 20 years? If so, how? (i.e.: routine maintenance, design and construction quality, use of high-performance construction materials, the intensity of use, maintaining regulatory code changes, etc.)

Has an "advance notice" form and an initial application for a restoration tax abatement been filed prior to construction commencement as instructed by the New Orleans City Council RTA Guidelines Resolution No. R-20-10? Yes  $\Box$  No  $\Box$  If not, please explain why below. (*applicable ONLY to projects filed on or after 1/16/20, but before 5/22/25 under the R-20-10 Rules*)

Has construction not commenced until an "advance notice" form had been filed timely and an initial application for a restoration tax abatement complied with all applicable pre-construction requirements sets forth in <u>La Admin Code</u>. <u>Chap 9, Sec I-903 (A)(B)</u> and <u>Sec I-905 (F)</u>? Yes  $\Box$  No  $\Box$  If not, please explain why below. (applicable ONLY to projects filed on or after 5/22/25 under the R-25-274 Rules) Appraised value of property before restoration: \$\_\_\_\_\_

Appraised value of property after restoration: \$\_\_\_\_\_

Building Permit Job Value (Materials, Machinery, Equipment, and Labor [excluding soft costs]): \$\_\_\_\_\_

Main Building Permit(s) associated with the construction job value:

Investment total eligible for tax abatement as defined by the state (<u>Materials</u>, <u>Machinery and Equipment</u>, and <u>Labor/Engineering</u>): \$\_\_\_\_\_

#### ADDITIONAL TAX BREAKS

Listing of all tax breaks or other financial incentives received, requested or pending which will assist with the renovations of the subject property. Such a listing might include investment tax credits, façade donations, industrial binds, etc.

(provide attachment if additional space is needed):

#### **EMPLOYMENT**

List the number new permanent jobs created as a result of the project and the title of those positions, if any. (provide attachment if additional space is needed):		

Total #:

#### SALES TAX REVENUE

List the projected amount of sales tax revenue due to generate as a result of the project's completion (if applicable):
\$\_\_\_\_\_

#### **ELIGIBILITY CERTIFICATION**

I hereby certify that I have read this document and that the information provided is accurate and complete.

I certify that the information provided can be substantiated by business documents. Upon request, I agree to provide the documentation requested to establish eligibility as established by the New Orleans City Council RTA Guidelines Resolution R-11-517.

I understand that providing incomplete, inaccurate, or untimely information may result in denial of tax abatement.

"Failure to provide accurate information to the City of New Orleans could result in the denial of your application."

### **OFFICE OF WORKFORCE DEVELOPMENT CITY OF NEW ORLEANS RTA APPLICANT ATTESTATION AND OWD GF FORM 1 OF 3**

Application #:	
Property Owner (s):	
Authorized Representative:	

#### Hire NOLA Policy

As provided in Sec. 70-499 the City of New Orleans established the Hire NOLA program to link quality employment opportunities created by City construction contracts and economic development projects with Local Workers. This program establishes a **First Source requirement and Good Faith Effort Participation Goals** on "covered projects". Contractors and their Subcontractors, if applicable, shall commit to making Good Faith Efforts to achieve aforementioned local participation goals.

#### **Living Wage Policy**

As provided in Sec. 70-810 the City of New Orleans established the Living Wage Ordinance. Applicants seeking a Restoration Tax Abatement are required to ensure the following:

- (1) Pursuant to Section 70-806 of the City Code, every Covered employer shall pay employees no less than the living wage for all hours worked as a Covered employee. The living wage shall be \$11.19, plus any applicable adjustment provided in Section 70-806, subpart (2).
- (2) Pursuant to Section 70-807 of the City Code, Covered employers shall permit Covered employees to take at least seven (7) days per year of compensated leave. Such leave shall comply with the guidelines set forth in Section 70-807.
- (1) Pursuant to Section 70-808 of the City Code, no Covered employer shall reduce any wages or benefits due to any employee to offset the costs of the Living Wage Ordinance or otherwise retaliate against any Covered employee based on the provisions of the Ordinance.

#### **Bidder's Attestation:**

My signature certifies that I understand the Hire NOLA program and Living Wage Ordinance. I further certify and agree that if awarded the contract, as the Contractor I will demonstrate Good Faith Effort to meet the stated Participation Goals. I understand my Good Faith Effort shall include but not be limited to the following:

- 1. Utilize OWD's Craft Employee Request Form to inform OWD of any potential vacancies on a "covered project."
- 2. Contact qualified individuals from the First Source database, as provided by OWD, for filling potential vacancies.
- 1. Solicit in the official journal of the City, or any other local publication, and advertise as provided below, any potential vacancies for local workforce candidates if First Source individuals are ultimately not qualified or available.
- 2. Advertise vacancies at local Union/Hiring Halls of registered apprenticeship programs, if applicable.
- 3. Advertise vacancies at the job site.
- 4. Conduct meeting(s) with potential managers and subcontractors to educate said individuals regarding the Local Hire goals provided herein.
- 5. Utilize registered apprenticeship programs at a 1 apprentice to 3 journeyman ratio, if applicable and available.

Respondent's Signature	
Respondent's Name	
Respondent's Title	

### **OFFICE OF WORKFORCE DEVELOPMENT**

### CITY OF NEW ORLEANS hire nola – manpower utilization schedule by craft – form 2 of 3

Application #:	
Property Owner (s):	
Authorized Representative:	

Month/Y ear	Man Count	Man Hours	Craft Type	# of Craft Workers						

If more space is needed attach additional sheets.

### OFFICE OF WORKFORCE DEVELOPMENT CITY OF NEW ORLEANS <u>HIRE NOLA LOCAL – HIRE PLAN – FORM 3 OF 3</u>

Application #:	
Property Owner (s):	
Authorized Representative:	

Please fill out the tables below based on the information provided in the submitted with the Manpower Utilization Schedule.

Contractor	Trade	Anticipated # of Work Hours Completed by Core Employees	Anticipated # of Core Employees on Project	Anticipated # of Work Hours Completed by New Hires	Anticipated # of New Hires Required	Anticipated # of Apprentices Required



### OFFICE OF SUPPLIER DIVERSITY CITY OF NEW ORLEANS

DBE Compliance Form-1 | **DBE RESPONSIVENESS FORM** 

Contact Office of Supplier Diversity for questions on completing this form. Via email: supplierdiversity@nola.gov

Instructions: Prior to award of a City contract, please complete and submit DBE Compliance Form-1. <u>List all DBE and</u> <u>Non-DBE firms</u> that will be utilized, and list scopes of work/services or goods they will perform or provide. Please ensure that all authorized signatories of each DBE firm listed signs this form. If you have <u>not</u> attained the amount of DBE participation to meet the contract goal, you are required to complete and submit DBE Compliance Form-2 along with all required supporting Good Faith Efforts documentation. Please reference the GFE Policy for further guidance. The GFE Policy is available via <u>www.nola.gov</u> or by request at <u>supplierdiversity@nola.gov</u>.

Solicitation #:\_\_\_\_\_ Project Name: \_\_\_\_\_ Date: \_\_\_\_\_

Name of Bidder/Proposer: \_\_\_\_\_\_ has satisfied the requirements of the bid/proposal specifications for the above referenced ITB/RFP/RFQ or solicitation by the City of New Orleans in the following manner:

(*Please check the appropriate space*)

The bidder/proposer is committed to the contract goal of \_\_\_\_\_\_% DBE utilization on this contract.

The bidder/proposer is unable to meet the current DBE contract goal, however, is committed to a minimum of \_\_\_\_% DBE utilization onthis contract and will submit documentation demonstrating good faith efforts in addition to this form. (*Please complete and submit DBE Compliance Form-2 along with all required supporting documentation*)

Total Bid/Proposal Amount:	\$ 100%
Total proposed DBE Amount:	\$ %

Bidder/Proposer's point-of-contact:

Name:	Title:
Phone:	Email:





#### CITY OF NEW ORLEANS DBE Compliance Form-1 | DBE RESPONSIVENESS FORM

o <u>.....</u>

Every DBE firm listed must be utilized on the project, and must perform a Commercially Useful Function. To remove or replace a DBE firm you must request & submit a DBE Removal/Substitution Request Form and receive approval from the OSDprior to removal or replacement the DBE firm.

#### DBE COMMITTEMENT TO CONTRACT GOAL: (Attach additional pages if necessary)

Name of DBE Firm	CERTIFICATION (SLDBE or LAUCP)	Scope(s) of Work to be performed by the DBE	Tier 1, 2, or 3 Subcontractor ?	Value of Proposed Contract with DBE	% OF TOTAL CONTRACT
					%
					%
					%
					%
					%
					%
					%
					%
					%
					%
			TOTAL		%

Sub-Contractors/Sub-Consultants and Manufacturers

Suppliers (For participation towards DBE Goal, count only 60% of total proposed Contract Value)

Name of DBE Firm	Certification (SLDBE or LAUCP)	Supplies to be provided by the DBE	100% of Value of Proposed Contract with DBE Supplier	60% Value of Proposed Contract with DBE Supplier	% OF TOTAL CONTRACT
					%
					%
					%
					%
					%
			TOTAL		%



### OFFICE OF SUPPLIER DIVERSITY CITY OF NEW ORLEANS

DBE Compliance Form-1 | DBE RESPONSIVENESS FORM

Solicitation #: \_\_\_\_\_ Bidder / Proposer: \_\_\_\_\_

#### DBE AFFIRMATION: (Attach additional pages if necessary)

The listed DBE firm(s) below affirm(s) that it will perform the Scope of Work for the estimated dollar value as stated in the DBE Commitment to Contract Goal section on page 2 of the DBE Compliance Form-6.

NAME of DBE FIRM	PRINT NAME of DBE FIRM'S AUTORIZED SIGNATORY	SIGNATURE of DBE FIRM'S AUTORIZED SIGNATORY	DATE
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			



Contact Office of Supplier Diversity for questions on completing this form. Via email: supplierdiversity@nola.gov

DBE Compliance Form-1 | DBE RESPONSIVENESS FORM

RFP/RFQ/Bid/Solicitation/Other #:\_\_\_\_\_ Bidder / Proposer: \_\_\_\_\_\_

#### NON-DBE SUBONTRACTORS AND SUPPLIERS: (Attach additional pages if necessary)

NAME of FIRM	PHONE	Scope of Work to be performed by the Subcontractor	VALUE of PROPOSED CONTRACT	% OF TOTAL CONTRACT
1.			\$	%
2.			\$	%
3.			\$	%
4.			\$	%
5.			\$	%
6.			\$	%
7.			\$	%
8.			\$	%
9.			\$	%
10.			\$	%
11.			\$	%
12.			\$	%
13.			\$	%
14.			\$	%
15.			\$	%

#### I HEREBY CERTIFY THAT THE INFORMATION CONTAINED HEREIN IS TRUE AND CORRECT.

PRINT NAME:\_\_\_\_\_\_\_\_\_\_SIGNATURE:\_\_\_\_\_\_\_

TITLE: \_\_\_\_\_\_

DATE:



OFFICE OF SUPPLIER DIVERSITY



# CITY OF NEW ORLEANS

#### DBE Compliance Form-2 | DOCUMENTATION OF GOOD FAITH EFFORTS

**<u>BIDDERS:</u>** This completed form along with all required supporting documentation must be furnished to the Bureau of Purchasing by the two (2) apparent lowest bidders within three (3) days of the bid opening. <u>Should the bidder fail to comply</u> with this request, the bid shall be considered non-responsive.

<u>RESPONDENTS:</u> This completed form must be furnished to the Bureau of Purchasing within ten (10) days of the City's issuance of Intent to Award Letter.

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\ Please check the appropriate space)

□ The Bidder/Respondent is unable to achieve any DBE Participation and has completed and submitted DBE Compliance Form-2 along with all required supporting GFE documentation.

□ The Bidder/Respondent is unable to meet the DBE contract goal, but is committed to a minimum of \_\_\_\_\_% DBE utilization on this contract and has completed and submitted DBE Compliance Form-2 along with all required supporting GFE documentation.

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SIGNATURE:

TITLE:

Instructions: Please complete sections A through D and include all specific supporting documentation as outlined below. <u>All sections of this form must be completed or your response may be deemed non-responsive. If you feel that any section of this form is not applicable, then you must provide a written statement as to why section is not applicable in your response. Attach additional pages if necessary.</u>

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### **CITY OF NEW ORLEANS**

DBE Compliance Form-2 | DOCUMENTATION OF GOOD FAITH EFFORTS

A. <u>SPECIFIC PORTIONS OF WORK IDENTIFIED FOR DBE SUBCONTRACTOR</u>: You must list all selected scopes or portions of work to be performed by DBE(s) in order to increase the likelihood of meeting the contract goal for this project and the estimated value of each scope or portions of work identified.

	Scope or Portions of Work Identified for DBE Participation	<b>Estimated Value</b>	% of Contract
1.		\$	%
2.		\$	%
3.		\$	%
4.		\$	%
5.		\$	%
6.		\$	%
7.		\$	%
8.		\$	%
9.		\$	%
10.		\$	%
11.		\$	%
12.		\$	%
	TOTAL	\$	%

- B. <u>NOTIFYING CERTIFIED DBEs OF CONTRACTING OPPORTUNITIES</u>: Please complete all fields below, list all sources of advertisement and outreach to DBE subs.
  - I. Did you attend all pre-bid and/or outreach meetings scheduled by the City?
  - II. Did you submit a subcontracting opportunity on the DBE Opportunities page?
  - III. Identify publications in which announcements or notifications were placed and published. Include a copy of each announcement or notification.

Source of Advertising/Outreach		What subcontracting areas of work were advertised?	Date of Ad	Due Date & Time for Sub Bids		OSD VERIFICATION	
				Date	Time		
1.							
2.							
3.							
4.							

YES	NO	Date of Meeting
YES	NO	Date of Meeting

OFFICE OF SUPPLIER DIVERSITY



CITY OF NEW ORLEANS DBE Compliance Form-2 | DOCUMENTATION OF GOOD FAITH EFFORTS

C. <u>INITIAL SOLICITATION & FOLLOW-UP:</u> You must complete all fields below, list all certified DBE firms that received telephone or e-mail notification of work items to be subcontracted. If no response was received to the initial solicitation, you must indicate when firms received subsequent telephone or email solicitations (list delivery date, or read receipt date, and DBE firm's response). You must include copies of the physical and/or electronic notice(s) sent to DBE firms. USE ADDITIONAL PAGES AS NEEDED

DBE FIRM & CONTACT	PHONE	Scope of Work Solicited		Result of Initial		of Follow-up/	Result of
			Notification	Communication		od of Contact one or Email)	Follow-up Communication
Ex. ABC Company /Jane Smith	(504) 123-4567	Legal services	01/01/14	Will submit a quote	01/10/14	email	Quote received
1.							\$
2.							\$
3.							\$
4.							\$
5.							\$
6.							\$
7.							\$
8.							\$
9.							\$
10.							\$
11.							\$
12.							\$
13.							\$
14.							\$
15.							\$
16.							\$
17.							\$
18.							\$
19.							\$
20.							\$
21.							\$
22.							\$
23.							\$
24.							\$
25.							\$



DBE Compliance Form-2 | DOCUMENTATION OF GOOD FAITH EFFORTS

- **D. NEGOTIATE IN GOOD FAITH:** You must provide an explanation for any rejected DBE bid or price quotation, unless another DBE is accepted for the same work.
  - I. Where price competitiveness is <u>not</u> the reason for rejection, complete all fields below and provide a copy of the written rejection notice including the reason for rejection to the rejected DBE firm. A meeting may be held with the rejected DBEs, if requested to discuss the rejection. You must attach a copy of the notice.

		Date		Mee	t with	DBE Sub?
DBE Subcontractor	Scope	rejection notice sent	Reason	Yes	No	Not requested

II. Where price competitiveness is the reason for rejection, complete all fields below and attach copies of all DBE and non-DBE bid quotes.

Scope	DBE Subcontractor	Quote	Non-DBE Subcontractor	Quote	Price Variance (+/-)
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	



# OFFICE OF SUPPLIER DIVERSITY

CITY OF NEW ORLEANS DBE Compliance Form-2 | DOCUMENTATION OF GOOD FAITH EFFORTS

III. <u>NEGOTIATE IN GOOD FAITH:</u> You must provide a copy of all correspondence documenting negotiation efforts including copies of DBE and non-DBE quotes and copies of written rejection notices.

**OTHER:** Please provide narrative details of any other efforts your firm conducted to attain the DBE Goal. Attach identified pages as warranted.



# OFFICE OF SUPPLIER DIVERSITY

# CITY OF NEW ORLEANS DBE Compliance Form-3 | MONTHLY DBE UTILIZATION REPORT

Contact Office of Supplier Diversity for questions on completing this form. Via email: <u>supplierdiversity@nola.gov</u>

CONTRACTOR:					Certified DBE:	□ YES	□ NO	Contract Start Date:	
DESCRIPTION:								Estimated Completion	n Date:
This report is for the month of:		JAN					🗆 ОСТ		
(CHECK ONE):		FEB			🗆 AUG			🗆 FIN	AL
		MARCH	□ JUNE		□ SEPT				
Original Contract Amount		Total Amount of Con	tract Changes	Fina	al Contract Amou	nt	Payme	ents to Date from	OFFICE USE ONLY
		(change orders or a	amendments)	-	ude contract chang	es)	-	of New Orleans	(Verification)
\$		\$		\$			\$		
Instructions: List all DBEs utiliz the established Percentage is n Effort (GFE) Policy for guidance	ot be . Rec	eing met, please incl quest a copy of the G	ude a narrative	description pplierdivers	of the progress ity@nola.gov (A	being mad	le in DBE par	ticipation. Please refe	
DBE SUBCONTRACTOR DI	BE DE	SCRIPTION OF WORK		DBE SUBCON	TRACT AMOUNT	DBE PAYN REPORT	ENTS THIS	PAYMENTS TO DATE	OFFICE USE ONLY (Verification)
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
TOTALS				\$		\$		\$	
I HEREBY CERTIFY THAT THE INFO CITY OF NEW ORLEANS OFFICE OF					UPPORTING DOC	CUMENTAT	ON IS ON FILE	AND IS AVAILABLE FOR	INSPECTION BY
PRINT NAME:									