

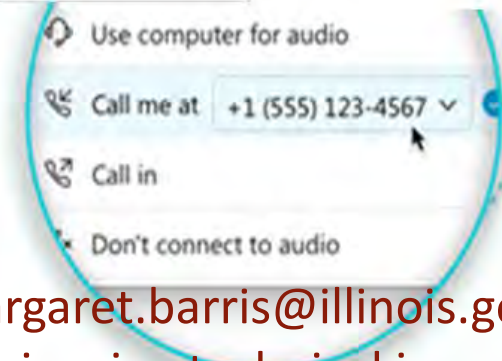
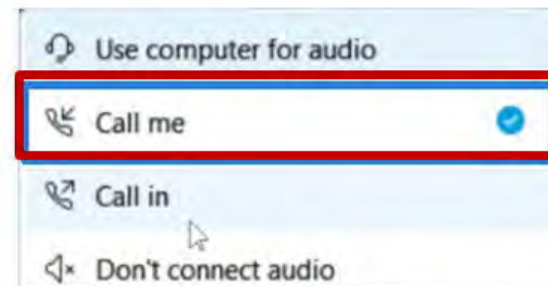
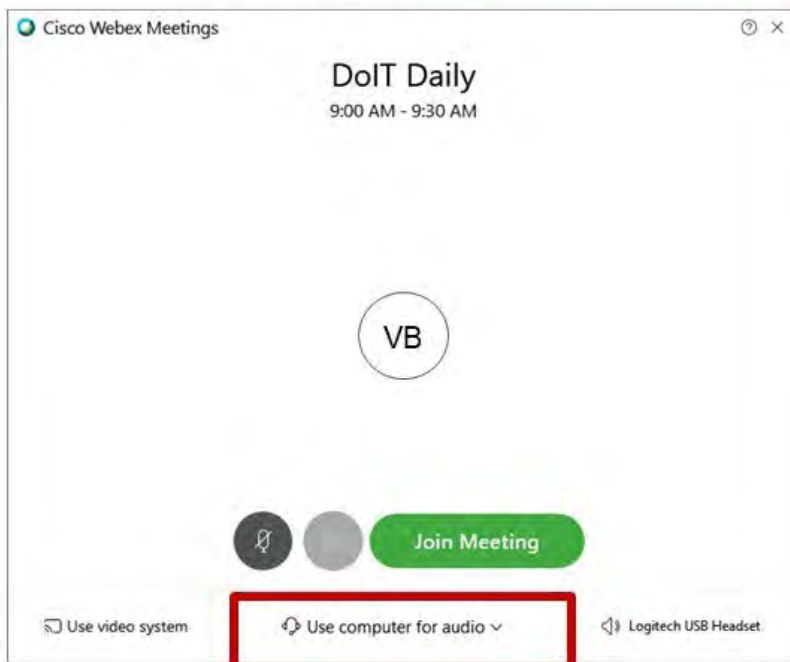
Illinois Historic Preservation Tax Credit 2024 Application Round 1

Thanks for joining

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1. From the audio connection options menu, select “Call me” OR “Use computer for audio”
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3. Click the **GREEN JOIN MEETING BUTTON**



Email: annamargaret.barris@illinois.gov
If you are experiencing technical issues

Illinois Historic Preservation Tax Credit 2024 Application Round 1 S-1 Workshop

February 21, 2024

Illinois State Historic Preservation Office
Illinois Department of Natural Resources



Illinois State Historic Preservation Office
Illinois Department of Natural Resources

Welcome

Carey L. Mayer, AIA, DSHPO
Office Director, Office of Realty and Capital
Planning
Manager, Illinois State Historic Preservation
Office
Illinois Department of Natural Resources

Carey.Mayer2@illinois.gov



Illinois Department of Natural Resources

“To manage, conserve and protect Illinois’ natural, recreational and cultural resources, further the public’s understanding and appreciation of those resources, and promote the education, science and public safety of Illinois’ natural resources for present and future generations.”

- DNR
 - State Historic Preservation Office



Illinois Department of Natural Resources

Architecture and Tax Incentives Staff

Carol Dyson, AIA, DSHPO, Tax Incentives Manager

Anthony Rubano, DSHPO, Project Reviewer

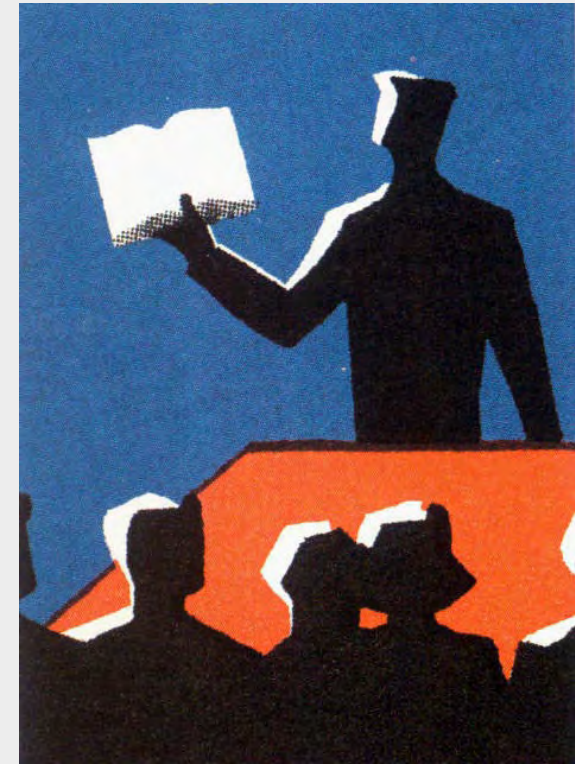
Anna Margaret Barris, Project Reviewer

Darius Bryjka, Project Reviewer



Agenda

- What's a "SHPO"?
- Statewide tax-credit (IL-HTC) program overview
- Part S-1: Application Workshop
- Part S-2: Online Submission
- Part S-3: Priority Assertion & Project Expenditures
- Assigning Allocations
- Certification of Qualified Rehabilitation Expenditures
- IL-HTC Certificate
- Questions



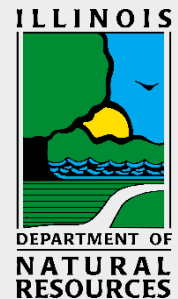
Illinois Department of Natural Resources

- **State Historic Preservation Office**
 - National Register of Historic Places
 - Financial Incentives
 - Certified Local Government
 - Cultural-Resource Protection
 - Archaeology



Illinois Department of Natural Resources

- SHPO = State Historic Preservation **Office**
 - State staff who administer federally mandated historic-preservation programs
- SHPO = State Historic Preservation **Officer**
 - By statute, Illinois SHPO is the director of DNR
 - On February 7, 2023, Gov. Pritzker appointed Natalie Phelps Finnie as Illinois' SHPO
- IL-HTC legislation refers to both
 - Office (Division) administers the program
 - Officer (Director) signs the Certificate



25% Illinois Historic Preservation Tax Credit (IL-HTC)

Program website

- Requirements
- Instructions
- Application forms and priority instructions
- PDF of this PowerPoint presentation

<https://dnrhistoric.illinois.gov/preserve/statecredit.html>

25% Illinois Historic Preservation Tax Credit (IL-HTC)

- Program runs from Jan. 1, 2019, to Dec. 31, 2028
- State income-tax credit equal to the lesser of:
 - 25% of Qualified Rehabilitation Expenditures (QRE) (same definition as for 20% federal historic tax credit or F-HTC), or
 - \$3 million
- Available statewide
- \$25 million of new allocations per year
- \$3 million credit cap per project
- Same project can't receive both RE-HTC and IL-HTC

25% Illinois Historic Preservation Tax Credit (IL-HTC)

- Same design review as F-HTC
- Same fiscal rules as F-HTC, except:
 - Competitive allocation process
 - Eligible IL-HTC QREs must:
 - be incurred between 1/1/19 and 12/31/28, and
 - exceed the pre-rehab adjusted basis
 - Third-party CPA must certify costs
 - Issuance fee of 2% of credit amount collected before SHPO can release IL-HTC Certificate
 - Credit can be carried forward 10 years

25% Illinois Historic Preservation Tax Credit (IL-HTC)

- Allocations assigned by SHPO twice a year based on:
 - Number of priorities met (up to 5)
 1. Border-county location
 2. Former government ownership
 3. Certain census tracts
 4. Development partnership
 5. Federal disaster declaration
 - Date and time of S-2 application receipt
 - Est. QREs or actual QREs at Part S-3 stage
- An allocation is not a tax credit

25% Illinois Historic Preservation Tax Credit (IL-HTC)

- Application consists of 3 parts:
 - **S-1:** virtual application workshop (right now)
 - **S-2:** online submission (assigns date and time SHPO receives application)
 - **S-3:** electronic submission (asserts priorities met and eligible QREs)
- Projects must complete all 3 parts to be placed in queue for allocation
- Projects must have F-HTC Part 2 approved by NPS before applying (a.k.a., prior to S-1 workshop)
- No allocation = may re-apply in future rounds

25% Illinois Historic Preservation Tax Credit (IL-HTC)

- Since 2019 (through 10 allocation rounds):
 - \$75 million in allocations
 - 31 projects
 - 16 communities
 - Over \$635 million in private expenditures

<https://dnrhistoric.illinois.gov/preserve/statecredit-economic-impact.html>



Mercer Carnegie Library, Aledo



Cook County Hospital, Chicago

2024 IL-HTC Application Dates

- **Round 1** (\$12,500,000 in allocations available)
 - **S-1** virtual workshop:
 - Wednesday, February 21, 2024, 1:30 P.M.
 - **S-2** online submission:
 - Starts on Wed., March 6, 2024, 10:00 A.M.
 - Ends on Thursday, March 7, 2024, 5:00 P.M.
 - **S-3** electronic submission:
 - Due at SHPO by Wednesday, March 27, 2024, 5:00 P.M.

2024 IL-HTC Application Dates

- **Round 2** (min. \$12,500,000 in allocations available)
 - **S-1** virtual workshop:
 - Wednesday, September 18, 2024, 1:30 P.M.
 - **S-2** online submission:
 - Starts on Wed., October 2, 2024, 10:00 A.M.
 - Ends on Thursday, October 3, 2024, 5:00 P.M.
 - **S-3** electronic submission:
 - Due at SHPO by Wednesday, Oct. 23, 2024, 5:00 P.M.

2025 IL-HTC Application Dates

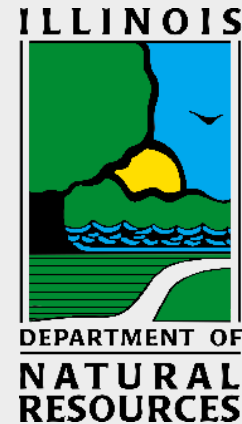
- **Round 1** (min. \$12,500,000 in allocations available)
 - **S-1** virtual workshop:
 - Wednesday, February 19, 2025, 1:30 P.M.
 - **S-2** online submission:
 - Starts on Wed., February 26, 2025, 10:00 A.M.
 - Ends on Thursday, February 27, 2025, 5:00 P.M.
 - **S-3** electronic submission:
 - Due at SHPO by Wednesday, March 12, 2025, 5:00 P.M.

2025 IL-HTC Application Dates

- **Round 2** (min. \$12,500,000 in allocations available)
 - **S-1** virtual workshop:
 - Wednesday, August 20, 2025, 1:30 P.M.
 - **S-2** online submission:
 - Starts on Wed., August 27, 2025, 10:00 A.M.
 - Ends on Thursday, August 28, 2025, 5:00 P.M.
 - **S-3** electronic submission:
 - Due at SHPO by Wednesday, September 10, 2025, 5:00 P.M.

IL-HTC Dovetails with F-HTC

- Must successfully *apply* for F-HTC
- Do not have to *claim* the F-HTC

Three overlapping copies of NPS Form 10-168 (Rev. 6/2023) are shown, tilted at an angle. The forms are:

- PART 1 – EVALUATION OF SIGNIFICANCE**: Includes fields for "Historic Property Name", "Street", "City", and "County".
- PART 2 – DESCRIPTION OF REHABILITATION**: Includes fields for "Historic Property Name", "Street", and "County".
- PART 3 – REQUEST FOR CERTIFICATION OF COMPLETED WORK**: Includes a field for "NPS Project Number".

Each form features the National Park Service arrowhead logo in the top right corner and instructions at the bottom.

IL-HTC Dovetails with F-HTC

- Must successfully *apply* for F-HTC
- Do not have to *claim* the F-HTC
 - Must have NPS-approved F-HTC Part 2 to apply
 - Must have NPS-approved F-HTC Part 3 and Cost Certification to receive an IL-HTC Certificate
 - F-HTC recapture will trigger IL-HTC recapture

The image displays three overlapping National Park Service (NPS) forms, each featuring the NPS arrowhead logo in the top right corner. The forms are:

- Top Form:** NPS Form 10-168 (Rev. 6/2023), National Park Service, OMB Control No. 1024-0009. **HISTORIC PRESERVATION CERTIFICATION APPLICATION PART 1 – EVALUATION OF SIGNIFICANCE**. It includes instructions and a section for "1. Historic Property Name" with fields for Street, City, and County.
- Middle Form:** NPS Form 10-168a (Rev. 6/2023), National Park Service, OMB Control No. 1024-0009. **HISTORIC PRESERVATION CERTIFICATION APPLICATION PART 2 – DESCRIPTION OF REHABILITATION**. It includes instructions and a section for "1. Historic Property Name" with fields for Street and County.
- Bottom Form:** NPS Form 10-168c (Rev. 6/2023), National Park Service, OMB Control No. 1024-0009. **HISTORIC PRESERVATION CERTIFICATION APPLICATION PART 3 – REQUEST FOR CERTIFICATION OF COMPLETED WORK**. It includes instructions and a field for "NPS Project Number".

IL-HTC Dovetails with F-HTC

- F-HTC applications **MUST**
 - Use current forms (revised 6/2023)
 - Follow file format standards and file naming conventions established by NPS
 - Be submitted electronically (no more hardcopies)

dnrhistorical.illinois.gov/preserve/taxcreditap.html

The image displays three overlapping National Park Service (NPS) forms for Historic Preservation Certification Applications, all revised in 2023. Each form features the NPS logo and the text 'NPS Form 10-168 (Rev. 6/2023), National Park Service, OMB Control No. 1024-0009'.
- The top form is **PART 1 – EVALUATION OF SIGNIFICANCE**. It includes instructions: 'Instructions: This page must bear the applicant's original signature and must be based on the descriptions in this application form. In the event of any discrepancies, supplementary material submitted with it (such as architectural plans, drawing precedence. A copy of this form will be provided to the Internal Revenue Service)'. It has a section for '1. Historic Property Name' with fields for Street, City, and County.
- The middle form is **PART 2 – DESCRIPTION OF REHABILITATION**. It includes the same instructions as Part 1. It has a section for '1. Historic Property Name' with fields for Street and County.
- The bottom form is **PART 3 – REQUEST FOR CERTIFICATION OF COMPLETED WORK**. It includes the same instructions. It has a section for '1. Historic Property Name' with fields for Street, City, and County, and a field for 'NPS Project Number'.

Part S-1: Virtual application workshop

- Project's representation at Part S-1 workshop meets statutorily required "readiness test"
- Anyone can represent a project
- To apply for IL-HTC, representation is required
- Must enter the NPS project number and location in the "Chat" to "Everyone" during the WebEx event
- Projects must have F-HTC Part 2 approved or conditionally approved by NPS by the date of that round's S-1 workshop

Part S-1: Virtual application workshop

NPS's "Check Project Status" website:

<https://tpsdev.cr.nps.gov/status/>

- NPS project number
- Parts 2 or 3 approval date

Home > Site Information > Check Project Status

Check Project Status

Check the status of a Historic Preservation Certification Application or search for projects by city and state or by state in the project status database.

Part 2 and Part 3 applications are not reviewed until the application review fee has been paid.

Information in the project status database is advisory only. Official notification regarding project decisions is made in writing to the property owner by the National Park Service.

Search by Project Number
The Project Number can be found on all correspondence from the National Park Service.
Project Number:

Search by Building Name
Enter the name of the Building
Building name:

Search by Building Address
Enter the Building Street Address
Building Address:

Search by City and State or by State
Enter the name of the city. Select the state from the drop-down menu.
City:
State:

Part S-1: Virtual application workshop

- On Monday, February 26, 2024, SHPO will post on program website all projects represented today
- The list will include known estimated QREs and Priority 1, 3, and 5 assertions

<https://dnrhistoric.illinois.gov/preserve/statecreditcurrent.html>

Part S-1: Project list posted on SHPO website

Projects represented at IL-HTC 2022 Round 1 S-1 Workshop and Eligible to Submit Part S-2 (sorted by NPS Project #)

Project Name	Project Street Address	Project City	NPS Project #	NPS Pt2		NPS Pt3		NPS Pt2/Pt3 Certification Date	Estimated Pt2 or Pt3 QREs	Priority #1	Priority #2	Priority #3	Priority #4	Priority #5
				NPS Pt2	Amd	NPS Pt3								
Ferguson Building	524 E. Monroe St.	Springfield	28279		x			9/2/2015	\$5,978,670.00		TBD		TBD	Met
Booth Building	518 E. Monroe St.	Springfield	30681		x			9/2/2015	\$5,320,200.00		TBD		TBD	Met
Kaskaskia Hotel	217 Marquette St.	LaSalle	35384	x				5/15/2017	\$28,000,000.00		TBD	Met	TBD	Met
Main Building (Armour Institute of Technology)	3300 S. Federal St.	Chicago	35905	x				9/18/2018	\$24,581,000.00	Met	TBD		TBD	Met
Carson Pirie Scott and Co., Founders Dept. Store	814-820 LaSalle St.	Ottawa	36611	x				1/19/2018	\$1,750,000.00		TBD	Met	TBD	Met
Julia C. Lathrop Homes (South Campus)	2759 N. Hoyne Ave.	Chicago	37327	x				10/25/2017	\$40,000,000.00	Met	TBD		TBD	Met
Hudson Motor Co. Showroom	2222 S. Michigan Ave.	Chicago	37742	x				6/7/2019	\$34,500,000.00	Met	TBD		TBD	Met
Chicago and Northwestern Railway Building	226 W. Jackson Blvd.	Chicago	39624			x		12/20/2021	\$100,149,128.00	Met	TBD		TBD	Met
Nathan H. Cohen Building	136 W. Main St.	Urbana	40768	x				12/31/2019	\$600,000.00		TBD		TBD	Met
Albert Pick & Co. Building	2159 W. Pershing Rd.	Chicago	40872	x				4/30/2020	\$38,600,000.00	Met	TBD	Met	TBD	Met
Urbana-Lincoln Hotel	300 S. Broadway Ave.	Urbana	41121	x				1/16/2020	\$16,027,652.00		TBD	Met	TBD	Met
Stahl House	603 S. Bench St.	Galena	41216	x				8/11/2020	\$300,000.00	Met	TBD		TBD	Met
Belvidere High School	520 Pearl Pl.	Belvidere	41990	x				6/16/2020	\$5,000,000.00	Met	TBD	Met	TBD	Met
McHenry County Courthouse & Jail	101 N. Johnson St.	Woodstock	42248		x			9/11/2020	\$12,420,000.00	Met	TBD	Met	TBD	Met
Fairview Sanatorium	905 N. Main St.	Normal	42689	x				9/2/2021	\$4,700,000.00		TBD		TBD	Met
The Broadgauge	101 N. 7th St.	Petersburg	42974	x				3/11/2021	\$1,300,000.00		TBD	Met	TBD	Met
Kankakee Title	149-151 N. Schuyler Ave.	Kankakee	43630		x			3/18/2022	\$2,110,641.00		TBD	Met	TBD	Met
Chapman Building	123 W. Pearl St.	Jerseyville	43718	x				9/1/2021	\$1,000,000.00		TBD		TBD	Met
Bank	1600 5th Ave.	Rock Island	43927	x				12/3/2021	\$550,000.00	Met	TBD	Met	TBD	Met

Projects ineligible to proceed due to lack of NPS Pt2/Pt3 Certification

Barber-Colman Company Complex	102 Loomis St.	Rockford	40056
Kankakee Federal Bank Building	310 S. Schuyler Ave.	Kankakee	43209
Pope Brace Company Building	197 S. West Ave.	Kankakee	43314

Orange - Priorities 2 and 4 to be determined based on S-3 submission

Blue - subject to change by 10/31/22

Part S-2: Online Submittal

- Establishes the order in which the sorted Part S-3s will receive allocations
- Automatic response email will confirm date and time that S-2 was received by SHPO
- Applying projects must have been represented at that round's S-1 workshop

<https://dnr2.illinois.gov/IHPTC/>

S-2

Part S-2: Online Submittal

- 2024 Round 1 Part S-2 will activate on **Wednesday, March 6, 2024, 10:00 A.M.**
- 2024 Round 1 Part S-2 will deactivate on **Thursday, March 7, 2024, 5:00 P.M.**

<https://dnr2.illinois.gov/IHPTC/>

Part S-2 of the 2024 Application Round 1 for the Illinois Historic Preservation Tax Credit Program

This form can only be submitted between Wednesday, March 6, 2024 10:00 AM Central Time, and Thursday, March 7, 2024 5:00 PM Central Time.

Your place in line for Part S-3 consideration will be based on the date and time that the Illinois Department of Natural Resources receives this submission.

This form may be submitted in:

54 Days 19 Hours 26 Minutes 48 Seconds

Submit Form

[Click here to return to program website](#)

All fields are required

NPS Project # (Numbers only, 5 characters):

Project Street Address:

Project City:

Part of the project's federal tax credit application that the NPS has certified: (Select one.)

- Part 2 of the federal tax credit application
 Part 3 of the federal tax credit application

Date of NPS Certification of your project's Part 2 or Part 3:

(Select from calendar. Date must be on or before Wednesday, February 21, 2024.)

Enter e-mail address for confirmation from IDNR of receipt of this application:

Re-enter e-mail address:

Submitted By

First Name:

Last Name:

All fields are required

Part S-2 of the 2024 Application Round 1 for the Illinois Historic Preservation Tax Credit Program

This form can only be submitted between Wednesday, March 6, 2024 10:00 AM Central Time, and Thursday, March 7, 2024 5:00 PM Central Time.

Your place in line for Part S-3 consideration will be based on the date and time that the Illinois Department of Natural Resources receives this submission.

This form may be submitted in:

54 Days 19 Hours 26 Minutes 48 Seconds

Submit Form

[Click here to return to program website](#)

Submit button will go live at exactly 10:00 A.M. on 3/6/24

All fields are required

NPS Project # (Numbers only, 5 characters):

Project Street Address:

Project City:

Part of the project's federal tax credit application that the NPS has certified: (Select one.)

- Part 2 of the federal tax credit application
 Part 3 of the federal tax credit application

Date of NPS Certification of your project's Part 2 or Part 3:

(Select from calendar. Date must be on or before Wednesday, February 21, 2024.)

Enter e-mail address for confirmation from IDNR of receipt of this application:

Re-enter e-mail address:

Submitted By

First Name:

Last Name:

All fields are required

Part S-2: Online Submittal

- Example of automatic email confirmation stating date and time of Part S-2 receipt

From: DoNotReply@illinois.gov <DoNotReply@illinois.gov>
Sent: Wednesday, July 10, 2019 10:04 AM
To: Hillshire, Bill <bill@thomasllc.com>
Subject: Part S-2 of 2019 IHPTC Program Application Received

IDNR received your Part S-2 of the 2019 Application Round 1 for the Illinois Historic Preservation Tax Program on Wednesday, July 10, 2019, 10:03:46.2587474. The information you provided is listed below.

Submitted by: Bill Hillshire
NPS Project Number: 12345
Address: 145 North Main Street
City: Peoria
Part of federal tax credit application: 3
Certified on: 4/18/2019

On Friday, July 26, 2019, IDNR will send an e-mail to this address that states the order in which all Part S-2 forms were received and whether your project is eligible to proceed with Part S-3 for this application round.

Part S-2: Online Submittal

- IDNR server determines order of S-2 receipt
- Server assigns every S-2 a unique, sequential ID number in the exact order that it received them
- Server-assigned ID numbers will reflect the official order of the S-2 submissions
- A project may submit multiple S-2s
 - SHPO will use the S-2 with the lowest ID number

Part S-2: Online Submittal

- On Monday, March 11, 2024, SHPO will email S-2 applicants the order of all valid S-2 submissions
- SHPO will post on program website all S-2 applicants, sorted by server ID number, noting any projects ineligible to proceed to S-3
- Eligible S-2 applicants may then submit their Part S-3 to SHPO

Part S-2: Raw results posted on SHPO website

DNR Server Receipt ID	Project Street Address	Project City	NPS Project #	NPS		Certification Date	Submitter First	Submitter Last	Date Stamp
				Pt2/Pt3	Name		Name		
1	814-820 LaSalle Street	Ottawa	36611	2		1/19/2018	Brant	Cohen	2019-07-10 10:00:00.6474965
2	1835 W. Harrison Street	Chicago	38097	2		4/18/2018	Chris	Horney	2019-07-10 10:00:00.6474965
3	1835 W Harrison Street	Chicago	38097	2		4/18/2018	Chris	Horney	2019-07-10 10:00:00.6631222
4	309 S. Main Street	Paris	39836	2		4/12/2019	Jayne	Lourash	2019-07-10 10:00:00.7725003
5	111 West Division Street	Chicago	35050	2		6/7/2017	Kendra	Stensven	2019-07-10 10:00:00.8506271
6	217 Marquette St.	LaSalle	35384	2		5/15/2017	Nathan	Watson	2019-07-10 10:00:00.8506271
7	518 East Monroe Street	Springfield	30681	2		9/2/2015	Rick	Lawrence	2019-07-10 10:00:00.9131287
8	111 West Division Street	Chicago	35050	2		6/7/2017	Kendra	Stensven	2019-07-10 10:00:00.9912560
9	1630 5th Avenue	Moline	35757	2		10/25/2017	Dan	Oliver	2019-07-10 10:00:01.0225063
10	1212 Larkin	Elgin	38866	2		3/1/2019	Lindsey	Haines	2019-07-10 10:00:01.0225063
11	5000 South 5th Avenue, Building 14	Hines	39950	2		4/19/2019	William	Taylor	2019-07-10 10:00:01.0537576
12	16 South Illinois Street	Belleville	39973	2		3/26/2019	Destini	Lednicki	2019-07-10 10:00:01.0537576
13	16 South Illinois Street	Belleville	39973	2		3/26/2019	Destini	Lednicki	2019-07-10 10:00:01.0850085
14	16 South Illinois Street	Belleville	39973	2		3/26/2019	Aaron	Burnett	2019-07-10 10:00:01.1006336
15	2231 East 67th street	Chicago	34265	2		10/20/2017	Ayman	Assaf	2019-07-10 10:00:01.1006336
16	5016 North Winthrop Avenue	Chicago	36981	2		9/19/2018	Todd	Wolcott	2019-07-10 10:00:01.1162593
17	111 West Division Street	Chicago	35050	2		6/7/2017	Kendra	Stensven	2019-07-10 10:00:01.1162593
18	1630 5th Avenue	Moline	35757	2		10/25/2017	Dan	Oliver	2019-07-10 10:00:01.1162593
19	11127-29 South Langley Avenue & 704-706 East 112th Street	Chicago	33720	2		5/5/2016	Andrew	Michaelson	2019-07-10 10:00:01.1318844
20	1835 W. Harrison Street	Chicago	38097	2		4/18/2018	Chris	Horney	2019-07-10 10:00:01.1475096
21	111 West Division Street	Chicago	35050	2		6/7/2017	Kendra	Stensven	2019-07-10 10:00:01.1631352
22	1630 5th Avenue	Moline	35757	2		10/25/2017	Dan	Oliver	2019-07-10 10:00:01.2100117
23	2000 West Diversey Parkway	Chicago	30753	2		11/16/2016	Will	Tippens	2019-07-10 10:00:01.2256369
24	111 West Division Street	Chicago	35050	2		6/7/2017	Kendra	Stensven	2019-07-10 10:00:01.2725134
25	2001 Edison Ave.	Granite City	35916	2		9/28/2018	Karen Bode	Baxter	2019-07-10 10:00:01.2725134
26	111 West Division Street	Chicago	35050	2		6/7/2017	Kendra	Stensven	2019-07-10 10:00:01.3037637
27	1835 W. Harrison Street	Chicago	38097	2		4/18/2018	Chris	Horney	2019-07-10 10:00:01.3350150
28	524 East Monroe Street	Springfield	28279	2		9/2/2015	Rick	Lawrence	2019-07-10 10:00:01.3662658
29	5012 North Winthrop Avenue	Chicago	36982	2		9/19/2018	Todd	Wolcott	2019-07-10 10:00:01.3818910
30	16 South Illinois Street	Belleville	39973	2		3/26/2019	J David	Dodson	2019-07-10 10:00:01.3975166
31	30 West Chicago Avenue	Chicago	34758	2		11/20/2018	Joseph	Dunne	2019-07-10 10:00:01.4287669
32	1518 25th Avenue	Moline	33268	2		12/19/2016	John	Lerdahl	2019-07-10 10:00:01.4600183
33	1835 W Harrison Street	Chicago	38097	2		4/18/2018	Chris	Horney	2019-07-10 10:00:01.4756434
34	309 S. Main Street	Paris	39836	2		4/12/2019	Jayne	Lourash	2019-07-10 10:00:01.4756434
35	16 South Illinois Street	Belleville	39973	2		3/26/2019	Heather	Loehr	2019-07-10 10:00:01.5068942
36	309 S Main Street	Paris	39836	2		4/12/2019	Jayne	Lourash	2019-07-10 10:00:01.5068942
37	11127-29 South Langley Avenue & 704-706 East 112th Street	Chicago	33720	2		5/5/2016	Andrew	Michaelson	2019-07-10 10:00:01.5068942
38	16 South Illinois Street	Belleville	39973	2		3/26/2019	Destini	Lednicki	2019-07-10 10:00:01.5225194
39	111 West Division Street	Chicago	35050	2		6/7/2017	Kendra	Stensven	2019-07-10 10:00:01.5850215

Part S-2: Raw results posted on SHPO website

DNR Server				NPS		Submitter First	Submitter Last	
Receipt ID	Project Street Address	Project City	NPS Project #	Pt2/Pt3	Certification Date	Name	Name	Date Stamp
1	814-820 LaSalle Street	Ottawa	36611	2	1/19/2018	Brant	Cohen	2019-07-10 10:00:00.6474965
2	1835 W. Harrison Street	Chicago	38097	2	4/18/2018	Chris	Horney	2019-07-10 10:00:00.6474965
3	1835 W Harrison Street	Chicago	38097	2	4/18/2018	Chris	Horney	2019-07-10 10:00:00.6631222
4	309 S. Main Street	Paris	39836	2	4/12/2019	Jayne	Lourash	2019-07-10 10:00:00.7725003
5	111 West Division Street	Chicago	35050	2	6/7/2017	Kendra	Stensven	2019-07-10 10:00:00.8506271
6	217 Marquette St.	LaSalle	35384	2	5/15/2017	Nathan	Watson	2019-07-10 10:00:00.8506271
7	518 East Monroe Street	Springfield	30681	2	9/2/2015	Rick	Lawrence	2019-07-10 10:00:00.9131287
8	111 West Division Street	Chicago	35050	2	6/7/2017	Kendra	Stensven	2019-07-10 10:00:00.9912560
9	1630 5th Avenue	Moline	35757	2	10/25/2017	Dan	Oliver	2019-07-10 10:00:01.0225063
10	1212 Larkin	Elgin	38866	2	3/1/2019	Lindsey	Haines	2019-07-10 10:00:01.0225063
11	5000 South 5th Avenue, Building 14	Hines	39950	2	4/19/2019	William	Taylor	2019-07-10 10:00:01.0537576
12	16 South Illinois Street	Belleville	39973	2	3/26/2019	Destini	Lednický	2019-07-10 10:00:01.0537576
13	16 South Illinois Street	Belleville	39973	2	3/26/2019	Destini	Lednický	2019-07-10 10:00:01.0850085
14	16 South Illinois Street	Belleville	39973	2	3/26/2019	Aaron	Burnett	2019-07-10 10:00:01.1006336
15	2231 East 67th street	Chicago	34265	2	10/20/2017	Ayman	Assaf	2019-07-10 10:00:01.1006336
16	5016 North Winthrop Avenue	Chicago	36981	2	9/19/2018	Todd	Wolcott	2019-07-10 10:00:01.1162593
17	111 West Division Street	Chicago	35050	2	6/7/2017	Kendra	Stensven	2019-07-10 10:00:01.1162593
18	1630 5th Avenue	Moline	35757	2	10/25/2017	Dan	Oliver	2019-07-10 10:00:01.1162593
19	11127-29 South Langley Avenue & 704-706 East 112th Street	Chicago	33720	2	5/5/2016	Andrew	Michaelson	2019-07-10 10:00:01.1318844
20	1835 W. Harrison Street	Chicago	38097	2	4/18/2018	Chris	Horney	2019-07-10 10:00:01.1475096
21	111 West Division Street	Chicago	35050	2	6/7/2017	Kendra	Stensven	2019-07-10 10:00:01.1631352
22	1630 5th Avenue	Moline	35757	2	10/25/2017	Dan	Oliver	2019-07-10 10:00:01.2100117
23	2000 West Diversey Parkway	Chicago	30753	2	11/16/2016	Will	Tippens	2019-07-10 10:00:01.2256369
24	111 West Division Street	Chicago	35050	2	6/7/2017	Kendra	Stensven	2019-07-10 10:00:01.2725134
25	2001 Edison Ave.	Granite City	35916	2	9/28/2018	Karen Bode	Baxter	2019-07-10 10:00:01.2725134
26	111 West Division Street	Chicago	35050	2	6/7/2017	Kendra	Stensven	2019-07-10 10:00:01.3037637
27	1835 W. Harrison Street	Chicago	38097	2	4/18/2018	Chris	Horney	2019-07-10 10:00:01.3350150
28	524 East Monroe Street	Springfield	28279	2	9/2/2015	Rick	Lawrence	2019-07-10 10:00:01.3662658
29	5012 North Winthrop Avenue	Chicago	36982	2	9/19/2018	Todd	Wolcott	2019-07-10 10:00:01.3818910
30	16 South Illinois Street	Belleville	39973	2	3/26/2019	J David	Dodson	2019-07-10 10:00:01.3975166
31	30 West Chicago Avenue	Chicago	34758	2	11/20/2018	Joseph	Dunne	2019-07-10 10:00:01.4287669
32	1518 25th Avenue	Moline	33268	2	12/19/2016	John	Lerdahl	2019-07-10 10:00:01.4600183
33	1835 W Harrison Street	Chicago	38097	2	4/18/2018	Chris	Horney	2019-07-10 10:00:01.4756434
34	309 S. Main Street	Paris	39836	2	4/12/2019	Jayne	Lourash	2019-07-10 10:00:01.4756434
35	16 South Illinois Street	Belleville	39973	2	3/26/2019	Heather	Loehr	2019-07-10 10:00:01.5068942
36	309 S Main Street	Paris	39836	2	4/12/2019	Jayne	Lourash	2019-07-10 10:00:01.5068942
37	11127-29 South Langley Avenue & 704-706 East 112th Street	Chicago	33720	2	5/5/2016	Andrew	Michaelson	2019-07-10 10:00:01.5068942
38	16 South Illinois Street	Belleville	39973	2	3/26/2019	Destini	Lednický	2019-07-10 10:00:01.5225194
39	111 West Division Street	Chicago	35050	2	6/7/2017	Kendra	Stensven	2019-07-10 10:00:01.5850215

Part S-2: Filtered results posted on SHPO website

Projects that completed IL-HTC 2019 Round 1 S-2 submittal and eligible to submit Part S-3 (sorted by date & time of receipt by IDNR)

Project street address	Project city	NPS Project #	S-2 Date Stamp	IDNR Server Receipt ID
814-820 LaSalle St.	Ottawa	36611	2019-07-10 10:00:00.6474965	1
1835 W. Harrison St.	Chicago	38097	2019-07-10 10:00:00.6474965	2
309 S. Main St.	Paris	39836	2019-07-10 10:00:00.7725003	4
111 W. Division St.	Chicago	35050	2019-07-10 10:00:00.8506271	5
217 Marquette St.	LaSalle	35384	2019-07-10 10:00:00.8506271	6
518 E. Monroe	Springfield	30681	2019-07-10 10:00:00.9131287	7
1630 5th Ave.	Moline	35757	2019-07-10 10:00:01.0225063	9
1212 Larkin Ave.	Elgin	38866	2019-07-10 10:00:01.0225063	10
5000 S. 5th Ave.	Hines	39950	2019-07-10 10:00:01.0537576	11
16 S. Illinois St.	Belleville	39973	2019-07-10 10:00:01.0537576	12
2231 E. 67th St.	Chicago	34265	2019-07-10 10:00:01.1006336	15
5016 N. Winthrop Ave.	Chicago	36981	2019-07-10 10:00:01.1162593	16
11127-29 S. Langley Ave. & 704-706 E. 112th St.	Chicago	33720	2019-07-10 10:00:01.1318844	19
2000 W. Diversey Pkwy.	Chicago	30753	2019-07-10 10:00:01.2256369	23
2001 Edison Ave.	Granite City	35916	2019-07-10 10:00:01.2725134	25
524 E. Monroe	Springfield	28279	2019-07-10 10:00:01.3662658	28
5012 N. Winthrop Ave.	Chicago	36982	2019-07-10 10:00:01.3818910	29
30 W. Chicago Ave.	Chicago	34758	2019-07-10 10:00:01.4287669	31
1518 25th Ave.	Moline	33268	2019-07-10 10:00:01.4600183	32
11941 S. Parnell Ave.	Chicago	37622	2019-07-10 10:00:01.5850215	40
3300 S. Federal St.	Chicago	35905	2019-07-10 10:00:01.9600313	55
510 E. Washington St.	Bloomington	35092	2019-07-10 10:00:01.9912821	58
221 E. 49th St.	Chicago	33991	2019-07-10 10:00:02.0537838	60
4750 N. Sheridan	Chicago	34669	2019-07-10 10:00:02.7100509	86
316 Randolph St.	Maywood	35126	2019-07-10 10:01:13.8525355	124

Part S-3: Electronic Submittal

- Applicant lists the project's est. or actual post 1/1/2019 QREs
- Applicant may assert Priorities 2 and/or 4
- All applying projects must submit Part S-3
- Applying projects must have submitted that round's Part S-2

S-3

Part S-3: Electronic Submittal

- Deadline for receiving Part S-3s at the SHPO is **Wednesday, March 27, 2024, 5:00 P.M.**
- E-mail the .pdf file to SHPO.StateCredit@illinois.gov
- SHPO will not open Part S-3s until the deadline has passed

Part S-3: Request for Corrections

- On or before April 10, 2024, SHPO will notify each applicant of the following:
 - If the S-3 contains any errors and omissions or not
 - What the specific errors and omissions are, if any
 - How to correct them
- Applicants may correct only those errors and omissions that were identified by the SHPO
- Uncorrected errors and omissions may affect allocation results

Part S-3: Deadline for Corrections

- Deadline for receiving requested Part S-3 corrections at the SHPO is **Wed., May 1, 2024, 5:00 P.M.**
- Submit **ONLY** the corrections requested by SHPO
- Email the .pdf file to SHPO.StateCredit@illinois.gov
- You can ask questions and submit the specified corrections until 5:00 P.M. on May 1, 2024

Part S-3:

- Section 1:
Project Information
- Section 2:
Project Expenditures
- Section 3:
Priorities Asserted
- Section 4:
Applicant Information

ILLINOIS
DEPARTMENT OF
NATURAL
RESOURCES

THE ILLINOIS DEPARTMENT OF NATURAL RESOURCES
ILLINOIS HISTORIC TAX CREDIT PROGRAM
PART S-3: VERIFICATION OF PRIORITIES
FOR ROUND 1, 2024
SHPO must receive this form electronically by 5:00 PM CST, Wed., Mar. 27, 2024

1. **Project Information**
Building Name: _____ NPS Project #: _____
Street Address: _____
City: _____

2. **Project Expenditures** (fully complete either Section 2.A or Section 2.B; do not leave fields blank or enter \$0)
2.A—If you have an approved F-HTC Part 2 or certified F-HTC Part 3 but no CPA-prepared Cost Certification, complete the following:
Estimated QREs incurred or to be incurred on and after 1/1/19 (cannot exceed F-HTC reported estimated QREs): _____
2.B—If you have a certified F-HTC Part 3 and a CPA-prepared Cost Certification, complete the following:
Final certified QREs from Cost Certification (attach copy): _____
Final certified QREs incurred on and after 1/1/19 from Cost Certification (attach copy): _____

3. **Priorities Asserted**
If you are asserting Priority 2 and/or 4, check the appropriate box below and attach documentation for each, as per program instructions. The SHPO has already determined whether your project meets Priorities 1, 3, and 5; please refer to [this list](#).

Priority 1: Border County
 Priority 2: [Government Ownership](#)
Priority 3: Census Tract
 Priority 4: [Development Partnership](#)
Priority 5: Disaster Declaration

4. **Applicant Information**
I hereby attest that all information contained in this application, including the attached documentation, is true to the best of my knowledge and belief.

Name: _____
Organization: _____
Address: _____
City: _____ State: _____
Phone: _____ E-mail: _____ Zip: _____
Signature: _____ Date: _____

E-mail form with attachments to SHPO.StateCredit@Illinois.gov as a single PDF file named in the following format: (project#)_2024Round1_S-3* (ex. 38097_2024Round1_S-3.pdf). The e-mail subject line should be: (project#)_2024Round1_S-3*

Part S-3:

- Section 1:
Project Information
- Section 2:
Project Expenditures
- Section 3:
Priorities Asserted
- Section 4:
Applicant Information

ILLINOIS
DEPARTMENT OF
NATURAL
RESOURCES

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Final certified QREs from Cost Certification (attach copy): _____
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Name: _____
Organization: _____
Address: _____
City: _____ State: _____
Phone: _____ E-mail: _____ Zip: _____
Signature: _____ Date: _____

E-mail form with attachments to SHPO.StateCredit@Illinois.gov as a single PDF file named in the following format: (project#)_2024Round1_S-3* (ex. 38097_2024Round1_S-3.pdf). The e-mail subject line should be: (project#)_2024Round1_S-3*

Part S-3:

- Priority 1: as of S-1
- Priority 2: as of S-3 submission
- Priority 3: Most recent 5-year estimate
- Priority 4: as of S-3 submission
- Priority 5: as of S-1

ILLINOIS
DEPARTMENT OF
NATURAL
RESOURCES

THE ILLINOIS DEPARTMENT OF NATURAL RESOURCES
ILLINOIS HISTORIC TAX CREDIT PROGRAM
PART S-3: VERIFICATION OF PRIORITIES
FOR ROUND 1, 2024
SHPO must receive this form electronically by 5:00 PM CST, Wed., Mar. 27, 2024

1. **Project Information**
Building Name: _____ NPS Project #: _____
Street Address: _____
City: _____

2. **Project Expenditures** (fully complete either Section 2.A or Section 2.B; do not leave fields blank or enter \$0)
2.A—If you have an approved F-HTC Part 2 or certified F-HTC Part 3 but no CPA-prepared Cost Certification, complete the following:
Estimated QREs incurred or to be incurred on and after 1/1/19 (cannot exceed F-HTC reported estimated QREs): _____
2.B—If you have a certified F-HTC Part 3 and a CPA-prepared Cost Certification, complete the following:
Final certified QREs from Cost Certification (attach copy): _____
Final certified QREs incurred on and after 1/1/19 from Cost Certification (attach copy): _____

3. **Priorities Asserted**
If you are asserting Priority 2 and/or 4, check the appropriate box below and attach documentation for each, as per program instructions. The SHPO has already determined whether your project meets Priorities 1, 3, and 5; please refer to [this list](#).

Priority 1: Border County
 Priority 2: [Government Ownership](#)
 Priority 3: Census Tract
 Priority 4: [Development Partnership](#)
 Priority 5: Disaster Declaration

4. **Applicant Information**
I hereby attest that all information contained in this application, including the attached documentation, is true to the best of my knowledge and belief.

Name: _____
Organization: _____
Address: _____
City: _____ State: _____
Phone: _____ E-mail: _____ Zip: _____
Signature: _____ Date: _____

E-mail form with attachments to SHPO.StateCredit@Illinois.gov as a single PDF file named in the following format: [project#]_2024Round1_S-3* (ex. 38097_2024Round1_S-3.pdf). The e-mail subject line should be: [project#]_2024Round1_S-3*

Part S-3

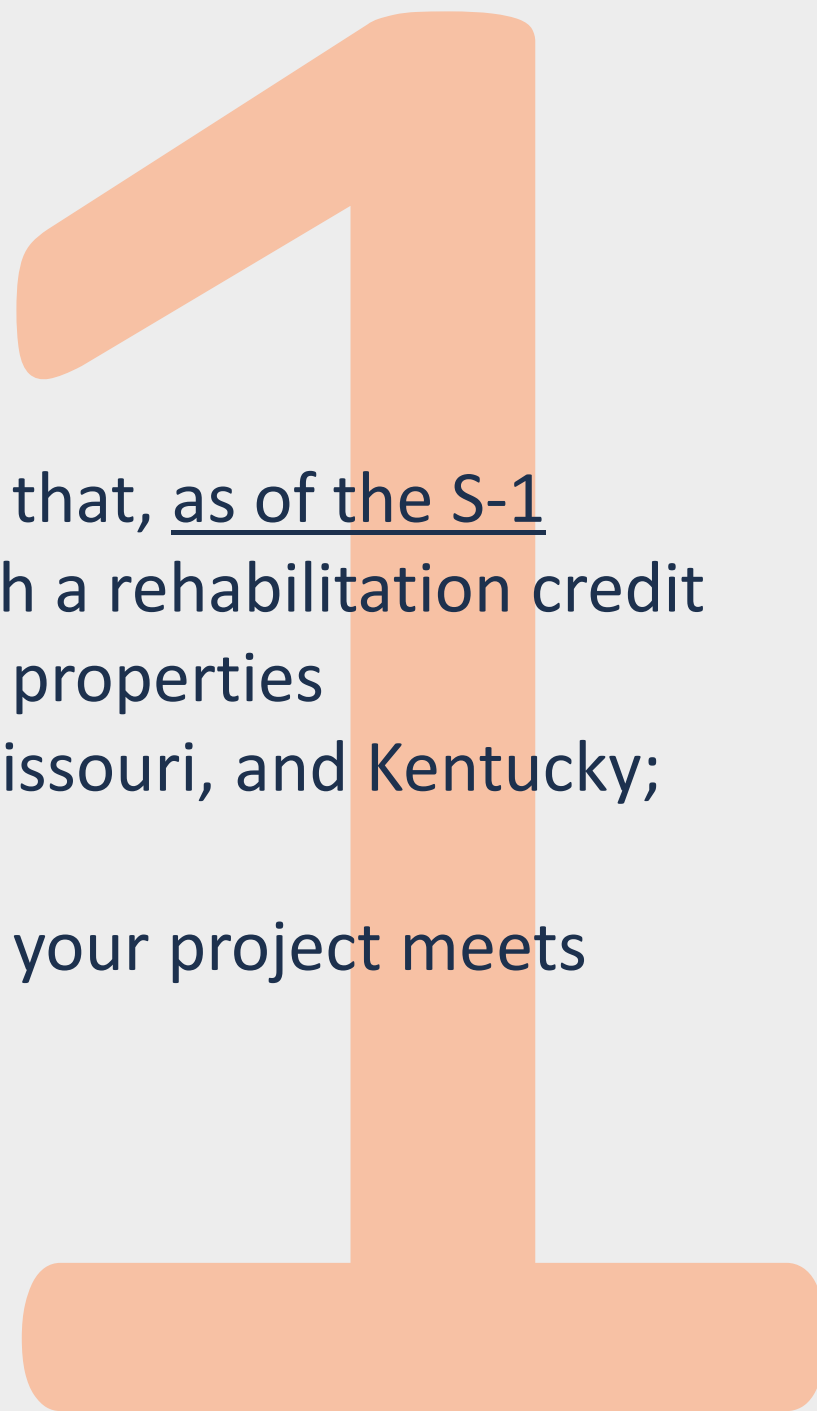
Priorities 1, 3, and 5

- SHPO will determine whether your project meets Priorities 1, 3, and 5
- On Monday, February 26, 2024, SHPO will post on program website projects' estimated QREs and which projects meet Priorities 1, 3, and 5
- <https://dnrhistoric.illinois.gov/content/dam/soi/en/web/dnrhistoric/preserve/documents/2024-round1-projects.pdf>
- If you disagree with our determination, you must contact us before 3/20/24

Part S-3

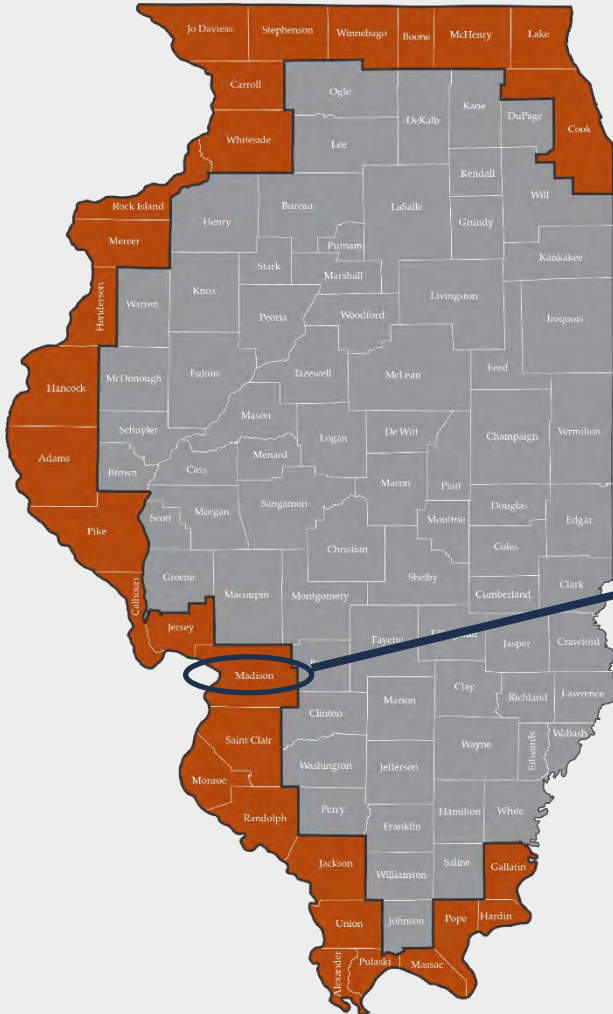
Priority 1: Border County

- Structure must be in a county that, as of the S-1 workshop, borders a state with a rehabilitation credit for historic income-producing properties
- Michigan, Wisconsin, Iowa, Missouri, and Kentucky; not Indiana
- SHPO will determine whether your project meets Priority 1



Part S-3

Priority 1: Border County



Illinois Department of
Natural Resources

One Natural Resources Way Springfield, Illinois 62702-1271
www.dnr.illinois.gov

JB Pritzker, Governor
Natalie Phelps Finnie, Director

Instructions for Determining Priority 1: Border County

To achieve Priority 1 (35 ILCS 31/20(a)(1)), the structure must be located in a county that borders a State with a historic income-producing property rehabilitation credit. For application Round 1, 2024, the States of Michigan, Wisconsin, Iowa, Missouri, and Kentucky shall be considered as having historic income-producing property rehabilitation credit programs. Therefore, to achieve Priority 1, the building must be located in one of the following Illinois counties:

- Adams
- Alexander
- Boone
- Calhoun
- Carroll
- Cook
- Gallatin
- Hancock
- Hardin
- Henderson
- Jackson
- Jersey
- Jo Daviess
- Lake
- Madison**
- Massac
- McHenry
- Mercer
- Monroe
- Pike
- Pope
- Pulaski
- Randolph
- Rock Island
- Saint Clair
- Stephenson
- Union
- Whiteside
- Winnebago

The SHPO has already determined whether your project meets Priority 1 in this application round; please [refer to this list](#). If you disagree with our determination, please contact us at SHPO.StateCredit@illinois.gov by March 20, 2024.

Part S-3

Priority 2: Government Ownership

- As of S-3 submittal (NOT including the S-3 corrective period), structure must have been owned by a federal, state, or local-governmental entity for no fewer than six months
- Applicant must establish
 1. Government ownership and
 2. Duration of ownership (at least 6 months)
- Submit proof with S-3

Part S-3

Priority 2: Government Ownership

- If it's not obvious that the owning entity is/was a unit of government (i.e., "Village of Oswego"), you must provide proof of the entity's governmental status.

Part S-3

Priority 2: Government Ownership

Submitted proof may include:

- Deeds or other ownership documents from the county recorder
- Historic or current records, such as newspaper articles, that establish governmental ownership and duration
- Published histories or vetted documents, such as NRHP nominations, stating ownership and duration



Part S-3

Priority 2: Government Ownership

Submitted proof may include:

- Photographs of original cornerstone, plaque, or sign establishing governmental ownership
- Copies of original drawings with title blocks establishing governmental commissioning

REVISION A	5-15-42		
B	6-15-42		
REVISION	DATE	BRIEF	BY
REVIEWED BY	NINTH NAVAL DISTRICT PUBLIC WORKS DEPARTMENT		
CHIEF OF DIV.			
APPROVED	Y&D DRAWING NO.		
<i>H. G. Owings</i>	Y&D 188095		
PUBLIC WORKS OFFICER			
SHEET 5 OF 25 ACCOMPANYING ARCHITECTS SERVICE CONTRACT NO. NOY 5122	SKIDMORE, OWINGS & MERRILL ARCHITECTS CHICAGO, ILLINOIS		
CONSTRUCTION CONTRACT NO. NOY 4364	U.S. NAVAL TRAINING STATION GREAT LAKES, ILL.		
DRAWN BY G.M.M. TRACED BY CHECKED BY K.E.A.	WELFARE BUILDING EXTERIOR ELEVATIONS		
ARCHITECTS DWG. NO. 5	SUBMITTED APRIL 6, 1942 SKIDMORE, OWINGS & MERRILL ARCHITECTS <i>H. G. Owings</i>		



Part S-3

Priority 3: Census Tract

- Structure must be in a census tract with a median family income at or below the Illinois median family income, according to the most recent 5-year estimate from the American Community Survey (ACS), published by the U.S. Census Bureau
- SHPO will determine whether your project meets Priority 3

Part S-3

Priority 3: Census Tract

- For 2024 Application Rounds 1 and 2, Illinois' most recent 5-year-estimate median family income is **\$99,215**
- Two-step process on U.S. Census Bureau's webpages

<https://geocoding.geo.census.gov/geocoder/geographies/address?form>

<https://data.census.gov/>

Priority 3: Census Tract

Step A—Determine your census tract

The image shows a web interface for geocoding. On the left, there are three main sections: "FIND LOCATIONS USING..." with options for One Line, Address, and Address Batch; "FIND GEOGRAPHIES USING..." with options for One Line, Address, Address Batch, and Geographic Coordinates; and "ABOUT DATA..." with options for Benchmarks and Vintages. The right side is titled "Find Address Results" and contains a form with the following fields: Street (1722 W. Homewood Ave.), City (Springfield), State (Illinois), Zip (62704), Benchmark (Public_AR_Current), and Vintage (Current_Current). A red box highlights the Street, City, State, and Zip fields, and another red box highlights the FIND button at the bottom left of the form.

Field	Value
Street :	1722 W. Homewood Ave.
City :	Springfield
State :	Illinois
Zip :	62704
Benchmark :	Public_AR_Current
Vintage :	Current_Current

FIND

<https://geocoding.geo.census.gov/geocoder/geographies/address?form>

Priority 3: Census Tract

Step A—Determine your census tract

Census Tracts:

GEOID: 17167002801

CENTLAT: +39.7682687

AREAWATER: 0

STATE: 17

BASENAME: 28.01

OID: 20790364127764

LSADC: CT

FUNCSTAT: S

INTPTLAT: +39.7682687

NAME: Census Tract 28.01

OBJECTID: 66147

TRACT: 002801

CENTLON: -089.6725926

AREALAND: 1852095

INTPTLON: -089.6725926

MTFCC: G5020

COUNTY: 167

Priority 3: Census Tract

Step B—Determine the median family income for your census tract

United States
Census
BUREAU

Explore Census Data

The Census Bureau is the leading source of quality data about the nation's people and economy.

× Search

[Advanced Search](#)

[Questions?](#)

[What is data.census.gov?](#)

[Release Notes](#)

[More data available](#)

<https://data.census.gov/>

Priority 3: Census Tract

Step B—Determine the median family income for your census tract

United States Census Bureau

Search: s1903

ALL TABLES MAPS PAGES

About 4,885 results | Filter

Tables

MEDIAN INCOME IN THE PAST 12 MONTHS (IN 2018 INFLATION-ADJUSTED DOLLARS)

Survey/Program: American Community Survey
 Years: 2018,2017,2016,2015,2014,2013,2012,2011,2010 Table: S1903

	United States					
	Number		Percent Distribution		Median income (dollars)	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
HOUSEHOLD INCOME BY R...						
Households	121,520,180	+/-153,217	121,520,180	+/-153,217	61,937	+/-94
One race--						
White	92,352,948	+/-110,884	76.0%	+/-0.1	65,902	+/-120
Black or African Ame...	15,097,600	+/-47,216	12.4%	+/-0.1	41,511	+/-183
American Indian and...	803,145	+/-15,888	0.7%	+/-0.1	44,722	+/-1,318

AGE AND SEX

Survey/Program: American Community Survey
 Years: 2018,2017,2016,2015,2014,2013,2012,2011,2010 Table: S0101

POPULATION 60 YEARS AND OVER IN THE UNITED STATES

Survey/Program: American Community Survey
 Years: 2018,2017,2016,2015,2014,2013,2012,2011,2010 Table: S0102

[VIEW ALL TABLES \(2440\)](#)

Priority 3: Census Tract

Step B—Determine the median family income for your census tract

1903 X Search

MEDIAN INCOME IN THE PAST 12 MONTHS (IN 2018 INFLATION-ADJUSTED DOLLARS)

Survey/Program: American Community Survey
TableID: S1903

Product: 2018: ACS 5-Year Estimates Subject Tables CUSTOMIZE TABLE

	United States					
	Number		Percent Distribution		Median income (dollars)	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
HOUSEHOLD INCOME BY RACE AND HIS...						
Households	119,730,128	+/-232,429	119,730,128	+/-232,429	60,293	+/-140
One race--						
White	91,831,095	+/-177,341	76.7%	+/-0.1	63,917	+/-126
Black or African American	14,683,705	+/-25,316	12.3%	+/-0.1	40,155	+/-116
American Indian and Alaska Native	869,951	+/-6,009	0.7%	+/-0.1	41,879	+/-311
Asian	5,566,667	+/-18,442	4.6%	+/-0.1	83,898	+/-294
Native Hawaiian and Other Pacific...	156,233	+/-2,411	0.1%	+/-0.1	61,354	+/-1,174
Some other race	4,215,366	+/-17,237	3.5%	+/-0.1	46,650	+/-188
Two or more races	2,407,111	+/-28,403	2.0%	+/-0.1	56,060	+/-336
Hispanic or Latino origin (of any race)	15,521,078	+/-39,908	13.0%	+/-0.1	49,225	+/-194
White alone, not Hispanic or Latino	81,417,177	+/-147,789	68.0%	+/-0.1	65,912	+/-141
HOUSEHOLD INCOME BY AGE OF HOUS...						
15 to 24 years	4,470,130	+/-26,692	3.7%	+/-0.1	31,189	+/-95
25 to 44 years	38,854,562	+/-81,402	32.5%	+/-0.1	65,893	+/-277
45 to 64 years	46,347,808	+/-42,664	38.7%	+/-0.1	72,912	+/-246
65 years and over	30,057,628	+/-94,729	25.1%	+/-0.1	43,680	+/-60
FAMILIES						
Families	78,697,103	+/-218,118	78,697,103	+/-218,118	73,965	+/-215
With own children of householder un...	33,435,099	+/-176,525	42.5%	+/-0.1	71,048	+/-394
With no own children of householder...	45,262,004	+/-52,405	57.5%	+/-0.1	75,771	+/-144
Married-couple families	57,816,948	+/-279,599	73.5%	+/-0.2	88,752	+/-210
With own children under 18 years	22,740,426	+/-202,033	28.9%	+/-0.2	95,854	+/-217
Female householder, no husband pre...	15,058,180	+/-39,767	19.1%	+/-0.1	36,414	+/-75
With own children under 18 years	7,965,331	+/-23,604	10.1%	+/-0.1	27,335	+/-73

Priority 3: Census Tract

Step B—Determine the median family income for your census tract

The screenshot shows the United States Census Bureau website interface. At the top left is the logo for the United States Census Bureau. To the right of the logo is a search bar containing the text 's1903'. Below the search bar is a navigation menu with the options 'ALL', 'TABLES', 'MAPS', and 'PAGES'. The 'TABLES' option is highlighted with an orange underline. Below the navigation menu, there are two buttons: 'Filter' (highlighted with a red box) and 'Download'. To the right of these buttons, the text '1332 Results' is displayed. Below the buttons and results count, there is a table header for 'MEDIAN INCOME IN THE PAST 12 MONTHS (IN 2018 INFLATION-ADJUSTED DOLLARS)'. The table header includes the following information: 'Survey/Program: American Community Survey' and 'TableID: S1903'. The table itself is partially visible, showing a column header 'Number' and a value 'Estimate'.

United States
Census
Bureau

Q s1903

ALL TABLES MAPS PAGES

1332 Results **Filter** | Download

MEDIAN INCOME IN THE PAST 12 MONTHS (IN 2018 INFLATION-ADJUSTED DOLLARS)
Survey/Program: American Community Survey
TableID: S1903

Number
Estimate

Priority 3: Census Tract

Step B—Determine the median family income for your census tract

Advanced Filters

e.g. 336111 - Automobile Manufacturing

BROWSE FILTERS	GEOGRAPHY	WITHIN STATE	ILLINOIS	SANGAMON COUNTY, ILLINOIS
Topics	<input type="checkbox"/> Show Summary Levels	District of Columbia	Pepe County, Illinois	<input type="checkbox"/> Census Tract 24, Sangamon County, Illinois
Geography	Nation	Florida	Pulaski County, Illinois	<input type="checkbox"/> Census Tract 25, Sangamon County, Illinois
Years	Region	Georgia	Putnam County, Illinois	<input type="checkbox"/> Census Tract 26, Sangamon County, Illinois
Surveys	Division	Guam	Randolph County, Illinois	<input type="checkbox"/> Census Tract 27, Sangamon County, Illinois
Codes	State	Hawaii	Richland County, Illinois	<input type="checkbox"/> Census Tract 28.01, Sangamon County, Illinois
	County	Idaho	Rock Island County, Illinois	<input type="checkbox"/> Census Tract 28.02, Sangamon County, Illinois
	Tract	Illinois	Sangamon County, Illinois	<input checked="" type="checkbox"/> Census Tract 28.02, Sangamon County, Illinois
	Block Group	Indiana	Saline County, Illinois	<input type="checkbox"/> Census Tract 29, Sangamon County, Illinois
	Block	Iowa	Schuyler County, Illinois	<input type="checkbox"/> Census Tract 3, Sangamon County, Illinois
	Zip Code Tabulation Area (Five-Digit)	Kansas	Scott County, Illinois	<input type="checkbox"/> Census Tract 30, Sangamon County, Illinois
	Elementary School District	Kentucky	Shelby County, Illinois	
	Secondary School District	Louisiana	St. Clair County, Illinois	
	Unified School District	Maine	Stark County, Illinois	
		Maryland	Stephenson County, Illinois	
			Tazewell County, Illinois	

Selected Filters:

Census Tract 28.01, Sangamon County, Illinois

Priority 3: Census Tract

Step B—Determine the median family income for your census tract

MEDIAN INCOME IN THE PAST 12 MONTHS (IN 2018 INFLATION-ADJUSTED DOLLARS)

Survey/Program: American Community Survey
TableID: S1903

Product: 2018 ACS 5-Year Estimates Subject Tables

Census Tract 28.01, Sangamon County, Illinois

	Number		Percent Distribution		Median income (dollars)
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate
▼ HOUSEHOLD INCOME BY RACE AND HIS...					
▼ Households	1,461	+/-132	1,461	+/-132	45,632
▼ One race--					
White	1,176	+/-112	80.5%	+/-6.0	50,469
Black or African American	234	+/-97	16.0%	+/-6.1	27,738
American Indian and Alaska Native	0	+/-11	0.0%	+/-1.9	-
Asian	31	+/-21	2.1%	+/-1.4	-
Native Hawaiian and Other Pacific...	0	+/-11	0.0%	+/-1.9	-
Some other race	17	+/-26	1.2%	+/-1.7	-
Two or more races	3	+/-5	0.2%	+/-0.3	-
Hispanic or Latino origin (of any race)	28	+/-31	1.9%	+/-2.1	-
White alone, not Hispanic or Latino	1,165	+/-108	79.7%	+/-5.8	50,898
▼ HOUSEHOLD INCOME BY AGE OF HOUS...					
15 to 24 years	139	+/-80	9.5%	+/-5.3	45,391
25 to 44 years	511	+/-105	35.0%	+/-6.1	35,815
45 to 64 years	490	+/-83	33.5%	+/-5.0	57,632
65 years and over	321	+/-52	22.0%	+/-3.7	43,977
▼ FAMILIES					
▼ Families	742	+/-109	742	+/-109	59,423
With own children of householder un...	277	+/-96	37.3%	+/-11.1	29,975
With no own children of householder...	465	+/-102	62.7%	+/-11.1	77,788
▼ Married-couple families	440	+/-85	59.3%	+/-10.6	79,167

Priority 3: Census Tract

Step B—Determine the median family income for your census tract

- If no value, go to earlier versions of the S1903 table

MEDIAN INCOME IN THE PAST 12 MONTHS (IN 2018 INFLATION-ADJUSTED DOLLARS)
Survey/Program: American Community Survey
TableID: S1903

Product: 2018 ACS 5-Year Estimates Subject Tables

CUSTOMIZE TABLE

Census Tract 14, Sangamon County, Illinois

	Number		Percent Distribution		Median income (dollars)	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
▼ HOUSEHOLD INCOME BY RACE AND HIS...						
▼ Households	505	+/-69	505	+/-69	15,673	+/-6,104
▼ One race—						
White	357	+/-74	70.7%	+/-10.6	14,336	+/-4,694
Black or African American	112	+/-55	22.2%	+/-10.4	-	**
American Indian and Alaska Native	10	+/-15	2.0%	+/-3.1	-	**
Asian	8	+/-12	1.6%	+/-2.2	-	**
Native Hawaiian and Other Pacific...	0	+/-11	0.0%	+/-5.3	-	**
Some other race	4	+/-6	0.8%	+/-1.2	-	**
Two or more races	14	+/-18	2.8%	+/-3.5	-	**
Hispanic or Latino origin (of any race)	0	+/-11	0.0%	+/-5.3	-	**
White alone, not Hispanic or Latino	357	+/-74	70.7%	+/-10.6	14,336	+/-4,694
▼ HOUSEHOLD INCOME BY AGE OF HOUS...						
15 to 24 years	30	+/-27	5.9%	+/-5.2	-	**
25 to 44 years	182	+/-53	36.0%	+/-8.1	-	**
45 to 64 years	237	+/-51	46.9%	+/-9.8	14,176	+/-3,040
65 years and over	56	+/-27	11.1%	+/-5.0	12,396	+/-10,061
▼ FAMILIES						
▼ Families	77	+/-40	77	+/-40	-	**
With own children of householder un...	29	+/-33	37.7%	+/-30.7	-	**
With no own children of householder...	48	+/-27	62.3%	+/-30.7	-	**
▼ Married-couple families	28	+/-20	36.4%	+/-23.8	-	**
With own children under 18 years	0	+/-11	0.0%	+/-29.2	-	**
▼ Female householder, no husband pre...	49	+/-35	63.6%	+/-23.8	-	**
With own children under 18 years	29	+/-33	37.7%	+/-30.7	-	**
▼ Male householder, no wife present	0	+/-11	0.0%	+/-29.2	-	**
With own children under 18 years	0	+/-11	0.0%	+/-29.2	-	**

Priority 3: Census Tract

Step B—Determine the median family income for your census tract

- If no value, go to earlier versions of the S1903 table

MEDIAN INCOME IN THE PAST 12 MONTHS (IN 2015 INFLATION-ADJUSTED DOLLARS)
 Survey/Program: American Community Survey
 TableID: S1903

Product: 2015 ACS 5-Year Estimated Subject Tables

CUSTOMIZE TABLE

Census Tract 14, Sangamon County, Illinois

	Total		Median income (dollars)	
	Estimate	Margin of Error	Estimate	Margin of Error
HOUSEHOLD INCOME BY RACE AND HISPANIC OR LATINO OR...				
Households	546	+/-63	19,828	+/-11,793
One race--				
White	83.0%	+/-9.8	17,837	+/-7,345
Black or African American	15.0%	+/-9.6	(X)	(X)
American Indian and Alaska Native	1.5%	+/-2.1	--	**
Asian	0.5%	+/-1.4	--	**
Native Hawaiian and Other Pacific Islander	0.0%	+/-4.9	--	**
Some other race	0.0%	+/-4.9	--	**
Two or more races	0.0%	+/-4.9	--	**
Hispanic or Latino origin (of any race)	1.6%	+/-2.9	--	**
White alone, not Hispanic or Latino	81.3%	+/-9.9	17,292	+/-7,086
HOUSEHOLD INCOME BY AGE OF HOUSEHOLDER				
15 to 24 years	5.3%	+/-4.2	(X)	(X)
25 to 44 years	29.1%	+/-8.0	(X)	(X)
45 to 64 years	51.3%	+/-8.9	(X)	(X)
65 years and over	14.3%	+/-5.5	(X)	(X)
FAMILIES				
Families	70	+/-43	76,429	+/-48,130
With own children of householder under 18 years	41.4%	+/-36.1	--	**
With no own children of householder under 18 years	58.6%	+/-36.1	68,250	+/-33,013
Married-couple families	58.6%	+/-36.1	68,250	+/-33,013
Female householder, no husband present	41.4%	+/-36.1	--	**
Male householder, no wife present	0.0%	+/-31.3	--	**
NONFAMILY HOUSEHOLDS				
Nonfamily households	476	+/-68	18,448	+/-6,926

Priority 3: Census Tract

Step B—Determine the median family income for your census tract

- ...and then compare the census tract value with the state median income estimate using the same 5-year estimate as was used for the census tract:
 - \$91,408 (2021 ACS 5-year estimate)
 - \$86,251 (2020 ACS 5-year estimate)
 - \$83,279 (2019 ACS 5-year estimate)
 - \$79,747 (2018 ACS 5-year estimate)
 - \$76,533 (2017 ACS 5-year estimate)
 - \$73,714 (2016 ACS 5-year estimate)
 - \$71,546 (2015 ACS 5-year estimate)
 - \$70,967 (2014 ACS 5-year estimate)
 - \$70,344 (2013 ACS 5-year estimate)
 - \$70,144 (2012 ACS 5-year estimate)

Part S-3

Priority 3: Census Tract

- If we cannot locate a value for a median income estimate for “Families” in any of the table S1903 versions on data.census.gov, your project cannot qualify for Priority 3 in this round
- Since the 5-year estimates are updated annually, we can revisit this priority in future rounds

Break

Part S-3

Priority 4: Development Partnership

- As of S-3 submittal (NOT including the S-3 corrective period), the project's development partnership must include at least one of the following:
 - Community Development Entity (CDE)
 - Low-profit organization
 - Benefit corporation
 - Low-profit limited liability company (L3C)
 - 501(c)(3) not-for-profit organization

Part S-3

Priority 4: Development Partnership

To assert this priority, applicant must provide:

1. Current affidavit included with the instructions, and
2. Proof that the “Development Partner” is a
 - CDE, or
 - benefit corporation, or
 - L3C, or
 - 501(c)(3)

Part S-3

Priority 4: Development Partnership

To assert this priority, applicant must provide:

1. Current affidavit attesting that the “Development Partner” is included in the development partnership
2. Affidavit must be:
 - signed by the Development Partner, and
 - signed by the applicant, and
 - respectively notarized

**DO NOT resubmit previously completed affidavits.
Must complete anew each round.**

Priority 4 Affidavit

Affidavit Regarding Priority 4 for 2024 Round 1 of The Illinois Historic Preservation Tax Credit Program (35 ILCS 31/20(a)(4))

The undersigned, Applicant for the Illinois Historic Preservation Tax Credit Program, attest that as of the date of this project's Part S-3 submission for Round 1 2024 the qualified rehabilitation plan with NPS Project No. _____ includes in the development partnership (insert Development Partner name) _____, which is a (check one of the following):

- Community Development Entity (CDE)
- Low-profit organization
- Not-for-profit organization (as defined by IRC Section 501(c)(3))

Upon request, the undersigned will provide documentation or access to documentation to verify the information provided herein. The undersigned grants the State of Illinois permission to access material, documentation and other data required to verify this information. Under penalties of perjury, the undersigned swear the information provided herein, and in any verifying information, is true and correct and that any misrepresentation or failure to provide requisite information may subject the undersigned to civil and criminal penalties as provided by State and/or Federal law.

Both signature Sections 1 and 2 below must be completed and notarized for Priority 4 consideration.

Section 1. Signature of Development Partner:

The undersigned representative of the Development Partner represents and certifies that he/she is authorized to execute this Affidavit.

Name _____ Signature _____ Date _____
Title _____ Organization _____
Organization's Employer Identification Number (EIN) _____

Notarization Section

On this _____ day of _____, 2024, before me, the undersigned notary public, satisfactory evidence of identification to be the person whose name is signed above, and swore or affirmed to me that the contents of the document are truthful and accurate to the best of his/her knowledge and belief.

Signature of Notary Public _____
My Commission Expires _____

Place notary seal above

Affidavit Regarding Priority 4, 2024 Round 1

Section 2. Signature of Applicant: (Must be completed by the applicant for the Illinois Historic Preservation Certification Application form—Part 2, Part 2 Amendment, or Part 2 Supplement to the National Park Service.)

The undersigned representative of the Applicant represents and certifies that he/she is authorized to execute this Affidavit.

Name _____ Signature _____
Title _____ Organization _____

Notarization Section

On this _____ day of _____, 2024, before me, the undersigned notary public, satisfactory evidence of identification to be the person whose name is signed above, and swore or affirmed to me that the contents of the document are truthful and accurate to the best of his/her knowledge and belief.

Signature of Notary Public _____
My Commission Expires _____

Priority 4 Affidavit:

■ Attestation

**Affidavit Regarding Priority 4 for 2024 Round 1 of
The Illinois Historic Preservation Tax Credit Program (35 ILCS 31/20(a)(4))**

The undersigned, Applicant for the Illinois Historic Preservation Tax Credit Program, attest that as of the date of this project's Part S-3 submission for Round 1 2024 the qualified rehabilitation plan with NPS Project No. _____ includes in the development partnership (insert Development Partner name) _____, which is a (check one of the following):

- Community Development Entity (CDE)
- Low-profit organization
- Not-for-profit organization (as defined by IRC Section 501(c)(3))

Upon request, the undersigned will provide documentation or access to documentation to verify the information provided herein. The undersigned grants the State of Illinois permission to access material, documentation and other data required to verify this information. Under penalties of perjury, the undersigned swear the information provided herein, and in any verifying information, is true and correct and that any misrepresentation or failure to provide requisite information may subject the undersigned to civil and criminal penalties as provided by State and/or Federal law.

Both signature Sections 1 and 2 below must be completed and notarized for Priority 4 consideration.

Section 1. Signature of Development Partner:

The undersigned representative of the Development Partner represents and certifies that he/she is authorized to execute this Affidavit.

Name	Signature	Date
Title	Organization	
Organization's Employer Identification Number (EIN)		

Notarization Section

On this _____ day of _____, 2024, before me, the undersigned notary public, _____ (name of document signer) personally appeared, proved to me through satisfactory evidence of identification to be the person whose name is signed above, and swore or affirmed to me that the contents of the document are truthful and accurate to the best of his/her knowledge and belief.

Signature of Notary Public

My Commission Expires

Place notary seal above

Affidavit Regarding Priority 4, 2024 Round 1

Page 1 of 2

Priority 4 Affidavit:

- Development Partner and notary signatures

**Affidavit Regarding Priority 4 for 2024 Round 1 of
The Illinois Historic Preservation Tax Credit Program (35 ILCS 31/20(a)(4))**

The undersigned, Applicant for the Illinois Historic Preservation Tax Credit Program, attest that as of the date of this project's Part S-3 submission for Round 1 2024 the qualified rehabilitation plan with NPS Project No. _____ includes in the development partnership (*insert Development Partner name*)

- Community Development Entity (CDE)
- Low-profit organization
- Not-for-profit organization (as defined by IRC Section 501(c)(3))

Upon request, the undersigned will provide documentation or access to documentation to verify the information provided herein. The undersigned grants the State of Illinois permission to access material, documentation and other data required to verify this information. Under penalties of perjury, the undersigned swear the information provided herein, and in any verifying information, is true and correct and that any misrepresentation or failure to provide requisite information may subject the undersigned to civil and criminal penalties as provided by State and/or Federal law.

Both signature Sections 1 and 2 below must be completed and notarized for Priority 4 consideration.

Section 1. Signature of Development Partner:

The undersigned representative of the Development Partner represents and certifies that he/she is authorized to execute this Affidavit.

Name	Signature	Date
Title	Organization	
Organization's Employer Identification Number (EIN)		

Notarization Section

On this _____ day of _____, 2024, before me, the undersigned notary public, satisfactory evidence of identification to be the person whose name is signed above, and swore or affirmed to me that the contents of the document are truthful and accurate to the best of his/her knowledge and belief.

Signature of Notary Public

My Commission Expires

Place notary seal above

Affidavit Regarding Priority 4, 2024 Round 1

Page 1 of 2

Priority 4 Affidavit:

- Applicant and notary signatures
- Must be completed by the current HPCA applicant
 - Not necessarily the original Pt2
 - Could be latest amendment or Pt3

Section 2. Signature of Applicant: (Must be completed by the applicant identified on the most recent Historic Preservation Certification Application form—Part 2, Part 2 Amendment, or Part 3—that was certified by the National Park Service.)

The undersigned representative of the Applicant represents and certifies that he/she is authorized to execute this Affidavit.

Name _____ Signature _____ Date _____

Title _____ Organization _____

Notarization Section

On this _____ day of _____, 2024, before me, the undersigned notary public, satisfactory evidence of identification to be the person whose name is signed above, and swore or affirmed to me that the contents of the document are truthful and accurate to the best of his/her knowledge and belief.

Signature of Notary Public _____

My Commission Expires _____

Place notary seal above

Affidavit Regarding Priority 4, 2024 Round 1

Part S-3

Priority 4: Development Partnership

To assert this priority, applicant must provide:

1. Current affidavit included with the instructions, and
2. Proof that the “Development Partner” is a
 - CDE, or
 - benefit corporation, or
 - L3C, or
 - 501(c)(3)

Part S-3

Priority 4: Development Partnership

To prove the Development Partner is a CDE, applicant must provide:

- CDE certification from the U.S. Dept. of the Treasury Community Development Financial Institutions Fund (CDFI Fund), *or*
- Printout/screen capture of the CDFI Fund website identifying the New Markets Tax Credit Program allocatee as a CDE:

www.cdfifund.gov/awards/nmtc

Part S-3

Priority 4: Development Partnership

To prove that the Development Partner is a benefit corporation, the applicant must provide:

- A copy of a legal document proving the organization is a “benefit corporation,” as defined by the authorizing law in the state in which the organization was incorporated
- In Illinois, see [Public Act 097-0885](#)

Part S-3

Priority 4: Development Partnership

To prove that the Development Partner is a low-profit limited liability company (L3C), the applicant must provide:

- A copy of a legal document proving the organization is an L3C, as defined by the authorizing law in the state in which the organization was incorporated
- In Illinois, see [Public Act 096-0126](#)

Part S-3

Priority 4: Development Partnership

To prove that the Development Partner is a 501(c)(3), the applicant must provide:

- A copy of a determination letter from the IRS, *or*
- A printout/screen capture of the IRS Select Check website identifying the entity as tax exempt:
apps.irs.gov/app/eos/

To be valid, proof must be dated within 24 months of Part S-3 submittal

Screen capture from the IRS Select Check website

The screenshot shows the IRS website interface. At the top left is the IRS logo. To its right is a search bar with the text "Search" and a magnifying glass icon. Further right are links for "Help", "News", and "Language" with a dropdown arrow. Below these are two buttons: "Charities & Nonprofits" and "Tax Pros". A navigation bar below the header contains links for "File", "Pay", "Refunds", "Credits & Deductions", and "Forms & Instructions". The main content area shows a breadcrumb trail: "Home > Tax Exempt Organization Search > A Safe Haven Foundation". Below this is a link to "< Back to Search Results". The title "A Safe Haven Foundation" is displayed in large, bold text, followed by the EIN "36-4444200" and location "Chicago, IL, United States". A section titled "Publication 78 Data" with an information icon contains the text: "Organizations eligible to receive tax-deductible charitable contributions. Users may rely on this list in determining deductibility of their contributions:". Below this, it states "On Publication 78 Data List: Yes" and "Deductibility Code: PC". Another section titled "Copies of Returns (990, 990-EZ, 990-PF, 990-T)" with an information icon contains the text: "Electronic copies (images) of Forms 990, 990-EZ, 990-PF or 990-T returns filed with the IRS by charities and non-profits." Below this text is a list of four items, each with a right-pointing chevron icon: "Tax Year 2020 Form 990", "Tax Year 2019 Form 990", "Tax Year 2018 Form 990", and "Tax Year 2016 Form 990".

IRS

Search

Help | News | Language

Charities & Nonprofits | Tax Pros

File | Pay | Refunds | Credits & Deductions | Forms & Instructions

Home > Tax Exempt Organization Search > A Safe Haven Foundation

< Back to Search Results

A Safe Haven Foundation

EIN: 36-4444200 | Chicago, IL, United States

Publication 78 Data ⓘ

Organizations eligible to receive tax-deductible charitable contributions. Users may rely on this list in determining deductibility of their contributions:

On Publication 78 Data List: Yes

Deductibility Code: PC

Copies of Returns (990, 990-EZ, 990-PF, 990-T) ⓘ

Electronic copies (images) of Forms 990, 990-EZ, 990-PF or 990-T returns filed with the IRS by charities and non-profits.

- > Tax Year 2020 Form 990
- > Tax Year 2019 Form 990
- > Tax Year 2018 Form 990
- > Tax Year 2016 Form 990

Screen capture from the IRS Select Check website

The screenshot shows the IRS Select Check website interface. At the top, there is the IRS logo, a search bar, and navigation links for 'Charities & Nonprofits' and 'Tax Pros'. Below this is a main navigation bar with categories: 'File', 'Pay', 'Refunds', 'Credits & Deductions', and 'Forms & Instructions'. The breadcrumb trail indicates the user is on the 'Tax Exempt Organization Search' page for 'A Safe Haven Foundation'. A red box highlights the organization name 'A Safe Haven Foundation' and its EIN '36-4444200'. Below this, the 'Publication 78 Data' section is visible, with a red box highlighting 'On Publication 78 Data List: Yes'. The 'Copies of Returns' section is also visible, listing forms for Tax Years 2020, 2019, 2018, and 2016.

Home > [Tax Exempt Organization Search](#) > A Safe Haven Foundation

< [Back to Search Results](#)

A Safe Haven Foundation

EIN: 36-4444200 | Chicago, IL, United States

Publication 78 Data ⓘ

Organizations eligible to receive tax-deductible charitable contributions. Users may rely on this list in determining deductibility of their contributions:

On Publication 78 Data List: Yes

Deductibility Code: [PC](#)

Copies of Returns (990, 990-EZ, 990-PF, 990-T) ⓘ

Electronic copies (images) of Forms 990, 990-EZ, 990-PF or 990-T returns filed with the IRS by charities and non-profits.

> Tax Year 2020 Form 990
> Tax Year 2019 Form 990
> Tax Year 2018 Form 990
> Tax Year 2016 Form 990

Matches the affidavit?

Not-for profit?

Part S-3

Priority 5: Disaster Declaration

- Structure must be in an area declared by the S-1 workshop an “Emergency Declaration” or “Major Disaster Declaration” under the “Robert T. Stafford Disaster Relief and Emergency Assistance Act”
- Declaration must < 3 years old from S-1 workshop
- Source of information is:
www.fema.gov/disaster/declarations
www.fema.gov/openfema-data-page/disaster-declarations-summaries-v2
- SHPO will determine whether your project meets Priority 5

Part S-3

Priority 5: Disaster Declaration

- As of today—the day of the S-1 workshop—there are 4 federal emergency declarations made within the last 3 years: December 13, 2021 (FEMA-3577-EM), October 14, 2022 (FEMA-4676-DR), August 15, 2023 (updated on September 15, 2023) (FEMA-4728-DR), and November 20, 2023 (FEMA-4749-DR).

Part S-3

Priority 5: Disaster Declaration

- In 2024 Round 1, projects in the following counties will receive Priority 5: **Bond, Cass, Christian, Clark, Coles, Cook, Cumberland, De Witt, Douglas, Edgar, Effingham, Fayette, Hancock, Jersey, Macon, Macoupin, Madison, McDonough, Menard, Monroe, Montgomery, Morgan, Moultrie, Pike, Sangamon, Scott, Shelby, St. Clair, Vermilion, Warren, and Washington**

Part S-3:

- Section 1: Project Information
- Section 2: Project Expenditures
- Section 3: Priorities Asserted
- Section 4: Applicant Information

ILLINOIS
DEPARTMENT OF
NATURAL
RESOURCES

THE ILLINOIS DEPARTMENT OF NATURAL RESOURCES
ILLINOIS HISTORIC TAX CREDIT PROGRAM
PART S-3: VERIFICATION OF PRIORITIES
FOR ROUND 1, 2024
SHPO must receive this form electronically by 5:00 PM CST, Wed., Mar. 27, 2024

1. **Project Information**
Building Name: _____ NPS Project #: _____
Street Address: _____
City: _____

2. **Project Expenditures** (fully complete either Section 2.A or Section 2.B; do not leave fields blank or enter \$0)
2.A—If you have an approved F-HTC Part 2 or certified F-HTC Part 3 but no CPA-prepared Cost Certification, complete the following:
Estimated QREs incurred or to be incurred on and after 1/1/19 (cannot exceed F-HTC reported estimated QREs): _____

2.B—If you have a certified F-HTC Part 3 and a CPA-prepared Cost Certification, complete the following:
Final certified QREs from Cost Certification (attach copy): _____
Final certified QREs incurred on and after 1/1/19 from Cost Certification (attach copy): _____

3. **Priorities Asserted**
If you are asserting Priority 2 and/or 4, check the appropriate box below and attach documentation for each, as per [program instructions](#). The SHPO has already determined whether your project meets Priorities 1, 3, and 5; please refer to [this list](#).

Priority 1: Border County
 Priority 2: [Government Ownership](#)
Priority 3: Census Tract
 Priority 4: [Development Partnership](#)
Priority 5: Disaster Declaration

4. **Applicant Information**
I hereby attest that all information contained in this application, including the attached documentation, is true to the best of my knowledge and belief.

Name: _____
Organization: _____
Address: _____
City: _____ State: _____
Phone: _____ E-mail: _____ Zip: _____
Signature: _____ Date: _____

E-mail form with attachments to SHPO.StateCredit@Illinois.gov as a single PDF file named in the following format: (project#)_2024Round1_S-3* (ex. 38097_2024Round1_S-3.pdf). The e-mail subject line should be: (project#)_2024Round1_S-3*

Part S-3 Project Expenditures

- Complete either 2.A or 2.B
- Whichever you complete, do not leave its field blank or enter “\$0”

ILLINOIS
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THE ILLINOIS DEPARTMENT OF NATURAL RESOURCES
ILLINOIS HISTORIC TAX CREDIT PROGRAM
PART S-3: VERIFICATION OF PRIORITIES
FOR ROUND 1, 2024
SHPO must receive this form electronically by 5:00 PM CST, Wed., Mar. 27, 2024

1. **Project Information**
Building Name: _____
Street Address: _____
City: _____ NPS Project #: _____

2. **Project Expenditures** (fully complete either Section 2.A or Section 2.B; do not leave fields blank or enter \$0)
2.A—If you have an approved F-HTC Part 2 or certified F-HTC Part 3 but no CPA-prepared Cost Certification, complete the following:
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2.B—If you have a certified F-HTC Part 3 and a CPA-prepared Cost Certification, complete the following:
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3. **Priorities Asserted**
If you are asserting Priority 2 and/or 4, check the appropriate box below and attach documentation for each, as per [program instructions](#). The SHPO has already determined whether your project meets **Priorities 1, 3, and 5**; please refer to [this list](#).

Priority 1: Border County
 Priority 2: [Government Ownership](#)
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 Priority 4: [Development Partnership](#)
Priority 5: Disaster Declaration

4. **Applicant Information**
I hereby attest that all information contained in this application, including the attached documentation, is true to the best of my knowledge and belief.

Name: _____
Organization: _____
Address: _____
City: _____ State: _____
Phone: _____ E-mail: _____ Zip: _____
Signature: _____ Date: _____

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Part S-3 Project Expenditures

- Fill out 2.A if you have:
 - F-HTC Part 2, or
 - F-HTC Part 3 and no cost certification
- Enter est. QREs incurred on or after 1/1/19

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Signature: _____ Date: _____

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Part S-3 Project Expenditures

- If estimated QREs incurred on or after 1/1/19 exceed F-HTC est. QREs, we will use the F-HTC estimated QREs

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If no Part 3 yet and actual QREs might exceed Part 2 est. QREs...

...you may submit an F-HTC amendment to increase Part 2 est. QREs:

- Select “amends a previously submitted” and “Part 2”
- State Part 2 est. QREs and revised est. QREs
- NPS must approve prior to 3/20/24

NPS Form 10-168b (Rev. 6/2023)
National Park Service
OMB Control No. 1024-0009

HISTORIC PRESERVATION CERTIFICATION APPLICATION AMENDMENT / ADVISORY DETERMINATION

Instructions: This page must bear the applicant's original signature and must be dated.

1. **Historic Property Name**
Street _____
City _____
County _____ State _____

2. **This form** includes additional information requested by NPS for an application currently on hold, updates applicant or contact information, amends a previously submitted Part 1 Part 2 Part 3 application, requests an advisory determination that the completed phase Standards for Rehabilitation. Phase completion date _____ of _____ phases of this rehabilitation. Estimated rehabilitation cost _____

Summarize information here, continue on following page if necessary.

3. **Project Contact (if different from applicant)**
Name _____
Street _____
Zip _____ Telephone _____ City _____ Company _____
Email Address _____

4. **Applicant**
I hereby attest that the information I have provided is, to the best of my knowledge, correct. I further attest that [check one or both boxes, as applicable] if I am not the owner of the above-described property within the meaning of "owner" set forth in 36 CFR § 67.2 (2011), and/or if I am the fee simple owner of the above described property, the fee simple owner is aware of the action I am taking relative to this application, as noted in a written statement from the owner, a copy of which (i) either is attached to this application form and incorporated previously submitted, and (ii) meets the requirements of 36 CFR § 67.3(a)(1) (2011). For purposes of this attestation, the singular shall include the plural wherever appropriate. I understand that knowing and willful falsification of this application may subject me to fines and imprisonment under 18 U.S.C. § 1001, which, under certain circumstances, provides for imprisonment.

Name _____
Applicant Entity _____
Street _____
Zip _____ Telephone _____ City _____ SSN _____ Date _____
Applicant SSN, or TIN has changed since previously submitted application. Email Address _____

NPS Official Use Only
The National Park Service has reviewed this amendment to the Historic Preservation Certification Application and has determined that the amendment: meets the Secretary of the Interior's Standards for Rehabilitation, will meet the Secretary of the Interior's Standard for Rehabilitation if the attached conditions are met, does not meet the Secretary of the Interior's Standards for Rehabilitation, updates the information on file and does not affect the certification.

Advisory Determinations:
 The National Park Service has determined that the work completed in this phase is consistent with the Secretary of the Interior's Standards for Rehabilitation and that the associated site work or new work has been completed. This approval could be superseded if it is found that the overall rehabilitation does not meet the Secretary's Standards. A copy of this determination is advisory only. A formal certification of rehabilitation can be issued only after all rehabilitation work and any associated site work or new work provided to the Internal Revenue Service.

Date _____
NPS conditions or comments attached _____
National Park Service Authorized Signature _____

Part S-3 Project Expenditures

- Fill out 2.B if you have F-HTC Part 3 and a CPA-prepared cost certification
- Enter final QREs from cost cert.
- Enter final post-1/1/19 QREs from cost certification
- Submit cost cert. with S-3

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Part S-3 Project Expenditures

- Why are we bothering? So we can award realistic allocations to as many projects as possible

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SHPO Ordering of Applications

After corrections deadline (5/1/24), SHPO will sort applications as follows:

1. Projects with 5 priorities in the order their S-2s were received
2. Projects with 4 priorities in the order their S-2s were received
3. Projects with 3 priorities in the order their S-2s were received
4. Projects with 2 priorities in the order their S-2s were received
5. Projects with 1 priority in the order their S-2s were received
6. Projects with 0 priorities in the order their S-2s were received

S-3 priority total takes precedence over S-2 arrival time

SHPO Ordering of Applications

- SHPO starts with the complete application with the most priorities and whose S-2 was received first
- SHPO proceeds in descending order until the available allocation amount has been assigned

Example:

Project A: S-2 was the 1st received. S-3 asserts 3 priorities

Project B: S-2 was the 8th received. S-3 asserts 4 priorities

Project B would receive an allocation before Project A.

SHPO Assigning Allocations

- Allocation will be the lesser of:
 - 25% of 2.A estimated post-1/1/19 QREs, or
 - 25% of 2.B final post-1/1/19 QREs, or
 - \$3 million
- ...depending on the remaining allocation amount

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SHPO Assigning Allocations

Allocation ≠ tax credit

- Allocation = 25% of estimated or final (CPA-certified) post-1/1/19 QREs, up to \$3 million
- Credit = CPA-certified post-1/1/19 QREs, up to allocation amount and after issuance fee is paid
- Allocation & Credit = CPA Cost Certification must define post-1/1/19 QREs

Announcing Allocations

On or before May 15, 2024, SHPO will:

- Email each S-3 applicant with allocation results
- Post on program website:
 - Summary of all S-3 applications, sorted by priority then by arrival time, and their respective allocations
 - Allocation amount available for the next application round

Part S-3: Summary spreadsheet on SHPO website

Allocation results of IL-HTC 2019 Round 1 (sorted by number of priorities met, then by date & time of receipt by IDNR)

NPS Project Number	Project Name	Project Street Address	Project City	Attendance	S-1 (workshop)		S-2 (electronic submittal)		S-3 (priority assertion & project expenditures)										IDNR Analysis													
					S-2 Date Stamp	IDNR Server Receipt ID	Priority #1		Priority #2		Priority #3		Priority #4		Priority #5		Q1 Estimated P12 or P13 QREs	Q2 Estimated QREs on/after 1/1/19	Q3 QREs on/after 1/1/19 from Cost Certification	Eligible QREs (column Q3 or lesser of Q2 and Q1)	25% of Eligible QREs	25% of Eligible QREs up to \$3,000,000	Allocation Total Available in this Round	Allocation Amount	Allocatable Amount in Excess of Available Allocation							
							Total	Met	Met	Met	Met	Met	Met	Met	Met	Met										Met	Met					
39973	Hotel Belleville	16 S. Illinois St.	Belleville	x	2019-07-10 10:00:01.0537576	12	4	x	Y	x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	-	\$12,000,000.00	\$12,000,000.00	\$12,000,000.00	\$3,000,000.00	\$3,000,000.00	\$0.00		
38097	Cook County Hospital Administration Building	1835 W. Harrison St.	Chicago	x	2019-07-10 10:00:00.6474965	2	3			x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	-	\$123,400,000.00	\$92,056,397.00	\$92,056,397.00	\$23,014,099.25	\$3,000,000.00	\$6,750,000.00	\$3,000,000.00	\$0.00
39836	Paris High School	309 S. Main St.	Paris	x	2019-07-10 10:00:00.7725003	4	3	x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	-	-	-	\$11,679,197.00	\$11,311,868.00	\$11,311,868.00	\$2,832,967.00	\$3,750,000.00	\$2,832,967.00	\$0.00	
39950	Edward Hines, Jr., VA Hospital Building #14	5000 S. 5th Ave.	Hines	x	2019-07-10 10:00:01.0537576	11	3			x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	-	\$5,500,000.00	\$5,500,000.00	\$5,500,000.00	\$1,375,000.00	\$1,375,000.00	\$917,033.00	\$457,967.00	
35016	Granite City YMCA	2061 Edison Ave.	Granite City	x	2019-07-10 10:00:01.2725134	25	3	x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	-	-	-	\$7,013,726.00	\$7,013,726.00	\$7,013,726.00	\$1,753,431.50	\$1,753,431.50	\$0.00	\$1,753,431.50	
33248	Garfield Elementary School	1518 25th Ave.	Moline	x	2019-07-10 10:00:01.4600183	32	3	x	Y	x	Y	x	Y	x	N	-	-	-	-	-	-	-	-	-	\$7,800,000.00	\$2,662,520.00	\$2,662,520.00	\$665,630.00	\$665,630.00	\$0.00	\$665,630.00	
37622	West Pullman Elementary School	11941 S. Parnell Ave.	Chicago	x	2019-07-10 10:00:01.5850215	40	3			x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	-	\$14,166,460.00	\$12,584,041.00	\$12,584,041.00	\$1,146,010.25	\$8,000,000.00	\$0.00	\$3,000,000.00	
35092	Bloomington High School	510 E. Washington St.	Bloomington	x	2019-07-10 10:00:01.9912821	58	3			x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	-	\$15,800,000.00	\$13,958,996.00	\$13,958,996.00	\$3,459,749.00	\$3,000,000.00	\$0.00	\$3,000,000.00	
35757	Fifth Avenue Block	1630 5th Ave.	Moline	x	2019-07-10 10:00:01.0225063	9	2	x	Y			x	Y	-	-	-	-	-	-	-	-	-	-	-	\$12,000,000.00	\$8,850,000.00	\$8,850,000.00	\$2,212,500.00	\$2,212,500.00	\$0.00	\$2,212,500.00	
34265	Shoreline Apartments	2231 E. 67th St.	Chicago	x	2019-07-10 10:00:01.1006336	15	2			x	Y	x	Y	-	-	-	-	-	-	-	-	-	-	-	\$12,800,000.00	\$4,760,000.00	\$4,760,000.00	\$1,190,000.00	\$1,190,000.00	\$0.00	\$1,190,000.00	
36981	Hotel Survey	5016 N. Winthrop Ave.	Chicago	x	2019-07-10 10:00:01.1162593	16	2			x	Y	x	Y	-	-	-	-	-	-	-	-	-	-	-	\$7,802,034.00	\$7,802,034.00	\$7,802,034.00	\$1,950,508.50	\$1,950,508.50	\$0.00	\$1,950,508.50	
33720	Pullman Artspace Lofts	11127-29 S. Langley Ave.	Chicago	x	2019-07-10 10:00:01.1318844	19	2			x	Y	x	Y	-	-	-	-	-	-	-	-	-	-	-	\$7,599,072.00	\$5,152,143.00	\$5,152,143.00	\$1,288,035.75	\$1,288,035.75	\$0.00	\$1,288,035.75	
36982	Hotel Warren	5012 N. Winthrop Ave.	Chicago	x	2019-07-10 10:00:01.3818910	29	2			x	Y	x	Y	-	-	-	-	-	-	-	-	-	-	-	\$9,158,910.00	\$9,158,910.00	\$9,158,910.00	\$2,289,727.50	\$2,289,727.50	\$0.00	\$2,289,727.50	
33991	Anthony Overton Elementary School	221 E. 49th St.	Chicago	x	2019-07-10 10:00:02.0557838	60	2			x	Y	x	Y	x	N	-	-	-	-	-	-	-	-	-	\$9,830,000.00	\$9,830,000.00	\$9,830,000.00	\$2,457,500.00	\$2,457,500.00	\$0.00	\$2,457,500.00	
36611	Carson Pine Seibt and Co. Founders Dept. Store	814-820 LaSalle St.	Ottawa	x	2019-07-10 10:00:00.6474965	1	1					x	Y	-	-	-	-	-	-	-	-	-	-	-	\$1,750,000.00	\$3,250,000.00	\$1,750,000.00	\$437,500.00	\$437,500.00	\$0.00	\$437,500.00	
35050	Mark Twain Hotel	111 W. Division St.	Chicago	x	2019-07-10 10:00:00.8506271	5	1					x	Y	-	-	-	-	-	-	-	-	-	-	-	\$23,991,354.00	\$23,032,464.00	\$23,032,464.00	\$5,758,116.00	\$3,000,000.00	\$0.00	\$3,000,000.00	
35364	Kaskaskia Hotel	217 Marquette St.	LaSalle	x	2019-07-10 10:00:00.8506271	6	1					x	Y	-	-	-	-	-	-	-	-	-	-	-	\$26,000,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
38866	Larkin Home for Children	1212 Larkin Ave.	Elgin	x	2019-07-10 10:00:01.0225063	10	1					x	Y	x	N	-	-	-	-	-	-	-	-	-	\$3,100,000.00	\$3,100,000.00	\$3,100,000.00	\$775,000.00	\$775,000.00	\$0.00	\$775,000.00	
30753	Lathrop Homes (North Campus)	2000 W. Diversey Pkwy.	Chicago	x	2019-07-10 10:00:01.2263669	23	1			x	Y	x	N	x	N	-	-	-	-	-	-	-	-	-	\$150,000,000.00	\$40,000,000.00	\$40,000,000.00	\$10,000,000.00	\$3,000,000.00	\$0.00	\$3,000,000.00	
34758	Victor F. Lawson House YMCA	30 W. Chicago Ave.	Chicago	x	2019-07-10 10:00:01.4287669	31	1					x	Y	-	-	-	-	-	-	-	-	-	-	-	\$67,004,950.00	\$67,004,950.00	\$67,004,950.00	\$16,751,237.50	\$3,000,000.00	\$0.00	\$3,000,000.00	
34669	ICA GreenRise Learning Laboratory	4750 N. Sheridan	Chicago	x	2019-07-10 10:00:02.7100509	86	1					x	Y	x	N	-	-	-	-	-	-	-	-	-	\$15,846,842.00	\$15,504,226.00	\$15,504,226.00	\$3,876,058.50	\$3,000,000.00	\$0.00	\$3,000,000.00	
30681	Booth Building	518 E. Monroe	Springfield	x	2019-07-10 10:00:00.9131287	7	0					x	N	-	-	-	-	-	-	-	-	-	-	-	\$5,320,200.00	\$3,621,866.00	\$3,621,866.00	\$905,466.50	\$905,466.50	\$0.00	\$905,466.50	
23279	Hergosen Building	524 E. Monroe	Springfield	x	2019-07-10 10:00:01.3462656	28	0					x	N	-	-	-	-	-	-	-	-	-	-	-	-	\$2,000,000.00	\$5,978,070.00	\$5,978,070.00	\$500,000.00	\$500,000.00	\$0.00	\$500,000.00
35905	Main Building (Armour Institute of Technology)	3300 S. Federal St.	Chicago	x	2019-07-10 10:00:01.9600313	55	0					x	N	-	-	-	-	-	-	-	-	-	-	-	-	\$4,581,000.00	\$4,581,000.00	\$4,581,000.00	\$6,145,250.00	\$3,000,000.00	\$0.00	\$3,000,000.00
																					\$578,143,745.00	\$388,773,811.00	\$388,773,811.00	\$578,143,745.00	\$95,823,785.25	\$47,633,266.75	\$0.00	\$9,750,000.00	\$37,883,266.75			

Notes:

- Priority #1—The structure must be located in a county that borders a state with a historic income-producing-property rehabilitation credit (https://www2.illinois.gov/dnr/historic/Preserve/Documents/IL-HTC_Priority%201.pdf).
- Priority #2—The structure must have been previously owned by a federal, state, or local-governmental entity for no less than six months (https://www2.illinois.gov/dnr/historic/Preserve/Documents/IL-HTC_Priority%202.pdf).
- Priority #3—The structure must be located in a census tract that has a median family income at or below the Illinois median family income; data from the most recent 5-year estimate from the American Community Survey (ACS), published by the U.S. Census Bureau, shall be used to determine eligibility (https://www2.illinois.gov/dnr/historic/Preserve/Documents/IL-HTC_Priority%203.pdf).
- Priority #4—The qualified rehabilitation plan must include in the development partnership a Community Development Entity, a low-profit organization, or a not-for-profit organization, as defined by Section 501(c)(3) of the Internal Revenue Code (https://www2.illinois.gov/dnr/historic/Preserve/Documents/IL-HTC_Priority%204.pdf).
- Priority #5—The structure must be located in an area declared under the federal Robert T. Stafford Disaster Relief and Emergency Assistance Act as an Emergency Declaration (pursuant to Title V of the Act) or Major Disaster Declaration (pursuant to Title IV of the Act). The declaration must be no older than 3 years at the time of application (https://www2.illinois.gov/dnr/historic/Preserve/Documents/IL-HTC_Priority%205.pdf).

IDNR based its priority concurrences on the documentation required in the instructions and provided with S-3 submittals.

Part S-3: Summary spreadsheet on SHPO website

Allocation results of IL-HTC 2019 Round 1 (sorted by number of priorities met, then by date & time of receipt by IDNR)

NPS Project Number	Project Name	Project Street Address	Project City	Attendance	S-1 (workshop)		S-2 (electronic submittal)		S-3 (priority assertion & project expenditures)										IDNR Analysis												
					S-2 Date Stamp	IDNR Server Receipt ID	Priority #1		Priority #2		Priority #3		Priority #4		Priority #5		Q1 Estimated P12 or P13 QREs	Q2 Estimated QREs on/after 1/1/19	Q3 QREs on/after 1/1/19 from Cost Certification	Eligible QREs (column Q3 or lesser of Q2 and Q1)	25% of Eligible QREs	25% of Eligible QREs up to \$3,000,000	Allocation Total Available in this Round	Allocation Amount	Allocatable Amount in Excess of Available Allocation						
							Total Priorities Met	Asserted	Met	Asserted	Met	Asserted	Met	Asserted	Met	Asserted										Met	Asserted				
39973	Hotel Belleville	16 S. Illinois St.	Belleville	x	2019-07-10 10:00:01.0537576	12	4	x	Y	x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	\$12,000,000.00	\$12,000,000.00	\$12,000,000.00	\$3,000,000.00	\$3,000,000.00	\$0.00		
38097	Cook County Hospital Administration Building	1835 W. Harrison St.	Chicago	x	2019-07-10 10:00:00.6474965	2	3			x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	\$123,400,000.00	\$92,056,397.00	\$92,056,397.00	\$23,014,099.25	\$3,000,000.00	\$6,750,000.00	\$3,000,000.00	\$0.00
39836	Paris High School	309 S. Main St.	Paris	x	2019-07-10 10:00:00.7725003	4	3	x	Y	x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	\$11,679,197.00	\$11,311,868.00	\$11,311,868.00	\$2,832,967.00	\$3,750,000.00	\$2,832,967.00	\$0.00	
39950	Edward Hines, Jr., VA Hospital Building #14	5000 S. 5th Ave.	Hines	x	2019-07-10 10:00:01.0537576	11	3			x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	\$5,500,000.00	\$5,500,000.00	\$5,500,000.00	\$1,375,000.00	\$1,375,000.00	\$917,033.00	\$917,033.00	\$457,967.00
35016	Granite City YMCA	2061 Edison Ave.	Granite City	x	2019-07-10 10:00:01.3725134	25	3	x	Y	x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	\$7,013,776.00	\$7,013,776.00	\$7,013,776.00	\$1,753,431.50	\$1,753,431.50	\$0.00	\$0.00	\$4,753,431.50
33268	Garfield Elementary School	1518 25th Ave.	Moline	x	2019-07-10 10:00:01.4600183	32	3	x	Y	x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	\$7,800,000.00	\$2,662,520.00	\$2,662,520.00	\$665,630.00	\$665,630.00	\$0.00	\$0.00	\$665,630.00
37622	West Pullman Elementary School	11941 S. Parnell Ave.	Chicago	x	2019-07-10 10:00:01.5850215	40	3			x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	\$14,166,460.00	\$12,584,041.00	\$12,584,041.00	\$1,146,010.25	\$8,000,000.00	\$0.00	\$0.00	\$3,000,000.00
35092	Bloomington High School	510 E. Washington St.	Bloomington	x	2019-07-10 10:00:01.9912821	58	3			x	Y	x	Y	x	Y	-	-	-	-	-	-	-	-	\$15,800,000.00	\$13,958,996.00	\$13,958,996.00	\$3,499,749.00	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
35757	Fifth Avenue Block	1630 5th Ave.	Moline	x	2019-07-10 10:00:01.0225063	9	2	x	Y			x	Y			-	-	-	-	-	-	-	-	\$12,000,000.00	\$8,850,000.00	\$8,850,000.00	\$2,212,500.00	\$2,212,500.00	\$0.00	\$0.00	\$2,212,500.00
34265	Shoreline Apartments	2231 E. 67th St.	Chicago	x	2019-07-10 10:00:01.1006336	15	2			x	Y	x	Y			-	-	-	-	-	-	-	-	\$12,800,000.00	\$4,760,000.00	\$4,760,000.00	\$1,190,000.00	\$1,190,000.00	\$0.00	\$0.00	\$1,190,000.00
36981	Hotel Survey	5016 N. Winthrop Ave.	Chicago	x	2019-07-10 10:00:01.1162593	16	2			x	Y	x	Y			-	-	-	-	-	-	-	-	\$7,802,034.00	\$7,802,034.00	\$7,802,034.00	\$1,950,508.50	\$1,950,508.50	\$0.00	\$0.00	\$1,950,508.50
33720	Pullman Artspace Lofts	11127-29 S. Langley Ave.	Chicago	x	2019-07-10 10:00:01.1318844	19	2			x	Y	x	Y			-	-	-	-	-	-	-	-	\$7,599,072.00	\$5,152,143.00	\$5,152,143.00	\$1,288,035.75	\$1,288,035.75	\$0.00	\$0.00	\$1,288,035.75
36982	Hotel Warren	5012 N. Winthrop Ave.	Chicago	x	2019-07-10 10:00:01.3818910	29	2			x	Y	x	Y			-	-	-	-	-	-	-	-	\$9,158,910.00	\$9,158,910.00	\$9,158,910.00	\$2,289,727.50	\$2,289,727.50	\$0.00	\$0.00	\$2,289,727.50
33991	Anthony Overton Elementary School	221 E. 49th St.	Chicago	x	2019-07-10 10:00:02.0537838	60	2			x	Y	x	Y	x	N	-	-	-	-	-	-	-	-	\$9,830,000.00	\$9,830,000.00	\$9,830,000.00	\$2,457,500.00	\$2,457,500.00	\$0.00	\$0.00	\$2,457,500.00
36611	Carson Pine Seibt and Co. Founders Dept. Store	814-820 LaSalle St.	Ottawa	x	2019-07-10 10:00:00.6474965	1	1			x	Y					-	-	-	-	-	-	-	-	\$1,750,000.00	\$3,250,000.00	\$3,250,000.00	\$437,500.00	\$437,500.00	\$0.00	\$0.00	\$437,500.00
35050	Mark Twain Hotel	111 W. Division St.	Chicago	x	2019-07-10 10:00:00.8506271	5	1			x	Y					-	-	-	-	-	-	-	-	\$23,991,354.00	\$23,032,464.00	\$23,032,464.00	\$5,758,116.00	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
35384	Kaskaskia Hotel	217 Marquette St.	LaSalle	x	2019-07-10 10:00:00.8506271	6	1			x	Y					-	-	-	-	-	-	-	-	\$26,000,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
38866	Larkin Home for Children	1212 Larkin Ave.	Elgin	x	2019-07-10 10:00:01.0225063	10	1			x	Y	x	N			-	-	-	-	-	-	-	-	\$8,100,000.00	\$775,000.00	\$775,000.00	\$775,000.00	\$775,000.00	\$0.00	\$0.00	\$775,000.00
30753	Lathrop Homes (North Campus)	2000 W. Diversey Pkwy.	Chicago	x	2019-07-10 10:00:01.2263669	23	1			x	Y	x	N	x	N	-	-	-	-	-	-	-	-	\$150,000,000.00	\$40,000,000.00	\$40,000,000.00	\$10,000,000.00	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
34758	Victor F. Lawson House YMCA	30 W. Chicago Ave.	Chicago	x	2019-07-10 10:00:01.4287669	31	1			x	Y					-	-	-	-	-	-	-	-	\$67,004,950.00	\$67,004,950.00	\$67,004,950.00	\$16,751,237.50	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
34669	ICA GreenLine Learning Laboratory	4750 N. Sheridan	Chicago	x	2019-07-10 10:00:02.7100509	86	1			x	Y	x	N			-	-	-	-	-	-	-	-	\$15,846,842.00	\$15,504,226.00	\$15,504,226.00	\$3,876,056.50	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
30681	Booth Building	518 E. Monroe	Springfield	x	2019-07-10 10:00:00.9131267	7	0					x	N			-	-	-	-	-	-	-	-	\$5,320,200.00	\$3,621,866.00	\$3,621,866.00	\$905,466.50	\$905,466.50	\$0.00	\$0.00	\$905,466.50
23279	Hergosen Building	524 E. Monroe	Springfield	x	2019-07-10 10:00:01.3462656	28	0					x	N			-	-	-	-	-	-	-	-	\$2,000,000.00	\$5,978,070.00	\$5,978,070.00	\$500,000.00	\$500,000.00	\$0.00	\$0.00	\$500,000.00
35905	Main Building (Armour Institute of Technology)	3300 S. Federal St.	Chicago	x	2019-07-10 10:00:01.9600313	55	0					x	N			-	-	-	-	-	-	-	-	\$4,581,000.00	\$4,581,000.00	\$4,581,000.00	\$6,145,250.00	\$8,000,000.00	\$0.00	\$0.00	\$8,000,000.00
																					\$578,143,745.00	\$388,773,811.00	\$578,143,745.00	\$388,773,811.00	\$388,295,141.00	\$95,823,785.25	\$47,633,266.75	\$0.00	\$9,750,000.00	\$37,883,266.75	

Notes:
 Priority #1—The structure must be located in a county that borders a state with a historic income-producing-property rehabilitation credit (https://www2.illinois.gov/dnrhistoric/Preserve/Documents/IL-HTC_Priority%201.pdf).
 Priority #2—The structure must have been previously owned by a federal, state, or local-governmental entity for no less than six months (https://www2.illinois.gov/dnrhistoric/Preserve/Documents/IL-HTC_Priority%202.pdf).
 Priority #3—The structure must be located in a census tract that has a median family income at or below the Illinois median family income; data from the most recent 5-year estimate from the American Community Survey (ACS), published by the U.S. Census Bureau, shall be used to determine eligibility (https://www2.illinois.gov/dnrhistoric/Preserve/Documents/IL-HTC_Priority%203.pdf).
 Priority #4—The qualified rehabilitation plan must include in the development partnership a Community Development Entity, a low-profit organization, or a not-for-profit organization, as defined by Section 501(c)(3) of the Internal Revenue Code (https://www2.illinois.gov/dnrhistoric/Preserve/Documents/IL-HTC_Priority%204.pdf).
 Priority #5—The structure must be located in an area declared under the federal Robert T. Stafford Disaster Relief and Emergency Assistance Act as an Emergency Declaration (pursuant to Title V of the Act) or Major Disaster Declaration (pursuant to Title IV of the Act). The declaration must be no older than 3 years at the time of application (https://www2.illinois.gov/dnrhistoric/Preserve/Documents/IL-HTC_Priority%205.pdf).

IDNR based its priority concurrences on the documentation required in the instructions and provided with S-3 submittals.

S-1

S-2

S-3

SHPO

Part S-3: Summary spreadsheet on SHPO website

S-2 (electronic submittal)		S-3 (priority assertion & project expenditures)											Q1		Q2	Q3
S-2 Date Stamp	IDNR Server Receipt ID	Total Priorities Met	Priority #1		Priority #2		Priority #3		Priority #4		Priority #5		Estimated Pt2 or Pt3 QREs	Estimated QREs on/after 1/1/19	QREs on/after 1/1/19 from Cost Certification	
			Asserted	Met	Asserted	Met	Asserted	Met	Asserted	Met	Asserted	Met				
2019-07-10 10:00:01.0537576	12	4	x	Y	x	Y	x	Y	x	Y	-	-	\$12,000,000.00	\$12,000,000.00		
2019-07-10 10:00:00.6474965	2	3			x	Y	x	Y	x	Y	-	-	\$123,400,000.00	\$92,056,397.00		
2019-07-10 10:00:00.7725003	4	3			x	Y	x	Y	x	Y	-	-	\$11,679,197.00	\$11,331,868.00		
2019-07-10 10:00:01.0537576	11	3			x	Y	x	Y	x	Y	-	-	\$5,500,000.00	\$5,500,000.00		
2019-07-10 10:00:01.2725134	25	3	x	Y	x	Y	x	Y			-	-	\$7,013,726.00	\$7,013,726.00		
2019-07-10 10:00:01.4600183	32	3	x	Y	x	Y	x	Y	x	N	-	-	\$7,800,000.00	\$2,662,520.00		
2019-07-10 10:00:01.5850215	40	3			x	Y	x	Y	x	Y	-	-	\$14,166,460.00	\$12,584,041.00		
2019-07-10 10:00:01.9912821	58	3			x	Y	x	Y	x	Y	-	-	\$15,800,000.00	\$13,998,996.00		
2019-07-10 10:00:01.0225063	9	2	x	Y			x	Y			-	-	\$12,000,000.00	\$8,850,000.00		
2019-07-10 10:00:01.1006336	15	2			x	Y	x	Y			-	-	\$12,800,000.00	\$4,760,000.00		
2019-07-10 10:00:01.1162593	16	2					x	Y	x	Y	-	-	\$7,802,034.00	\$7,802,034.00		
2019-07-10 10:00:01.1318844	19	2					x	Y	x	Y	-	-	\$7,599,072.00	\$5,152,143.00		
2019-07-10 10:00:01.3818910	29	2					x	Y	x	Y	-	-	\$9,158,910.00	\$9,158,910.00		
2019-07-10 10:00:02.0537838	60	2			x	Y	x	Y	x	N	-	-	\$9,830,000.00	\$9,830,000.00		
2019-07-10 10:00:00.6474965	1	1					x	Y			-	-	\$1,750,000.00	\$3,250,000.00		
2019-07-10 10:00:00.8506271	5	1							x	Y	-	-	\$23,991,354.00	\$23,032,464.00		
2019-07-10 10:00:00.8506271	6	1					x	Y			-	-	\$28,000,000.00	\$0.00		
2019-07-10 10:00:01.0225063	10	1					x	Y	x	N	-	-	\$3,100,000.00	\$3,100,000.00		
2019-07-10 10:00:01.2256369	23	1			x	Y	x	N	x	N	-	-	\$150,000,000.00	\$40,000,000.00		
2019-07-10 10:00:01.4287669	31	1							x	Y	-	-	\$67,004,950.00	\$67,004,950.00		
2019-07-10 10:00:02.7100509	86	1					x	Y	x	N	-	-	\$15,846,842.00	\$15,504,226.00		
2019-07-10 10:00:00.9131287	7	0					x	N			-	-	\$5,320,200.00	\$3,621,866.00		
2019-07-10 10:00:01.3662658	28	0					x	N			-	-	\$2,000,000.00	\$5,978,670.00		
2019-07-10 10:00:01.9600313	55	0							x	N	-	-	\$24,581,000.00	\$24,581,000.00		
													\$578,143,745.00	\$388,773,811.00		

Part S-3: Summary spreadsheet on SHPO website

Estimates)			IDNR Analysis					
Q1	Q2	Q3	Eligible QREs (column Q3 or lesser of Q2 and Q1)	25% of Eligible QREs	25% of Eligible QREs up to \$3,000,000	Allocation Total Available in this Round	Allocation Amount	Allocatable Amount in Excess of Available Allocation
Estimated Pt2 or Pt3 QREs	Estimated QREs on/after 1/1/19	QREs on/after 1/1/19 from Cost Certification						
\$12,000,000.00	\$12,000,000.00		\$12,000,000.00	\$3,000,000.00	\$3,000,000.00	\$9,750,000.00	\$3,000,000.00	\$0.00
\$123,400,000.00	\$92,056,397.00		\$92,056,397.00	\$23,014,099.25	\$3,000,000.00	\$6,750,000.00	\$3,000,000.00	\$0.00
\$11,679,197.00	\$11,331,868.00		\$11,331,868.00	\$2,832,967.00	\$2,832,967.00	\$3,750,000.00	\$2,832,967.00	\$0.00
\$5,500,000.00	\$5,500,000.00		\$5,500,000.00	\$1,375,000.00	\$1,375,000.00	\$917,033.00	\$917,033.00	\$457,967.00
\$7,013,726.00	\$7,013,726.00		\$7,013,726.00	\$1,753,431.50	\$1,753,431.50	\$0.00	\$0.00	\$1,753,431.50
\$7,800,000.00	\$2,662,520.00		\$2,662,520.00	\$665,630.00	\$665,630.00	\$0.00	\$0.00	\$665,630.00
\$14,166,460.00	\$12,584,041.00		\$12,584,041.00	\$3,146,010.25	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
\$15,800,000.00	\$13,998,996.00		\$13,998,996.00	\$3,499,749.00	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
\$12,000,000.00	\$8,850,000.00		\$8,850,000.00	\$2,212,500.00	\$2,212,500.00	\$0.00	\$0.00	\$2,212,500.00
\$12,800,000.00	\$4,760,000.00		\$4,760,000.00	\$1,190,000.00	\$1,190,000.00	\$0.00	\$0.00	\$1,190,000.00
\$7,802,034.00	\$7,802,034.00		\$7,802,034.00	\$1,950,508.50	\$1,950,508.50	\$0.00	\$0.00	\$1,950,508.50
\$7,599,072.00	\$5,152,143.00		\$5,152,143.00	\$1,288,035.75	\$1,288,035.75	\$0.00	\$0.00	\$1,288,035.75
\$9,158,910.00	\$9,158,910.00		\$9,158,910.00	\$2,289,727.50	\$2,289,727.50	\$0.00	\$0.00	\$2,289,727.50
\$9,830,000.00	\$9,830,000.00		\$9,830,000.00	\$2,457,500.00	\$2,457,500.00	\$0.00	\$0.00	\$2,457,500.00
\$1,750,000.00	\$3,250,000.00		\$1,750,000.00	\$437,500.00	\$437,500.00	\$0.00	\$0.00	\$437,500.00
\$23,991,354.00	\$23,032,464.00		\$23,032,464.00	\$5,758,116.00	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
\$28,000,000.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$3,100,000.00	\$3,100,000.00		\$3,100,000.00	\$775,000.00	\$775,000.00	\$0.00	\$0.00	\$775,000.00
\$150,000,000.00	\$40,000,000.00		\$40,000,000.00	\$10,000,000.00	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
\$67,004,950.00	\$67,004,950.00		\$67,004,950.00	\$16,751,237.50	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
\$15,846,842.00	\$15,504,226.00		\$15,504,226.00	\$3,876,056.50	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
\$5,320,200.00	\$3,621,866.00		\$3,621,866.00	\$905,466.50	\$905,466.50	\$0.00	\$0.00	\$905,466.50
\$2,000,000.00	\$5,978,670.00		\$2,000,000.00	\$500,000.00	\$500,000.00	\$0.00	\$0.00	\$500,000.00
\$24,581,000.00	\$24,581,000.00		\$24,581,000.00	\$6,145,250.00	\$3,000,000.00	\$0.00	\$0.00	\$3,000,000.00
\$578,143,745.00	\$388,773,811.00		\$383,295,141.00	\$95,823,785.25	\$47,633,266.75	\$0.00	\$9,750,000.00	\$37,883,266.75

Didn't receive an allocation?

- Same project can reapply in subsequent rounds
 - Must attend those rounds' S-1 workshops
- Statute does not prohibit completed projects from applying; QREs must be incurred after 1/1/19 *and* exceed starting adjusted basis
 - Projects placed into service 3 years ago from date of application may not be able to use the credit (amending state tax returns limited to 3 years)
- Single project may not receive more than \$3 million in state credits

Didn't receive enough allocation?

- Projects receiving partial allocations may apply for the balance in subsequent rounds
 - Must attend those rounds' S-1 workshops
- Projects whose certified QREs > allocation may reapply for the balance in subsequent rounds
 - Must attend those rounds' S-1 workshops
- Projects that do not want their partial allocations can return them
- Single project may not receive more than \$3 million in state credits

Rescinding allocations


- If there's lack of sufficient progress after allocation, the SHPO may require the allocatee to provide "sufficient evidence of reviewable progress"
See: 35 ILCS 31/20.f
- Allocations can be rescinded
- If NPS closes the federal tax credit project file, allocation will be rescinded
- Rescinded allocations will be made available in future application rounds

Now that you have an allocation, what now?

- Remember: Allocation \neq tax credit
- Continue to implement and finish your project
- Obtain a certified F-HTC Part 3 from the NPS
- Complete and fully sign the IL-HTC Certification of Qualified Rehabilitation Expenditures form

IL-HTC Certification of Qualified Rehabilitation Expenditures

- Owner fills out and signs Sections 1 and 2

 THE ILLINOIS DEPARTMENT OF NATURAL RESOURCES
ILLINOIS HISTORIC PRESERVATION TAX-CREDIT PROGRAM
CERTIFICATION OF QUALIFIED REHABILITATION EXPENDITURES

FEDERAL PROJECT NUMBER _____ DATE OF NPS CERTIFICATION OF PART-3 _____

1. **Name of property** _____
Street _____
City _____ County _____ Zip _____

2. **Owner** _____
I hereby attest that all information contained in this application, including the documentation, is true to the best of my knowledge and belief. I am granting the State of Illinois access to material, documentation and other data required to verify application information.
Name _____ Signature _____
Organization _____ FEIN _____ Date _____
Street _____ City _____
State _____ Zip _____ Phone _____ Email _____

3. **Expenditures**

Total of qualified rehabilitation expenditures (QRE)	\$ _____
Total of QRE incurred between 1/1/2019—12/31/2028	\$ _____
Total of non-qualified rehabilitation expenditures (non-QRE)	\$ _____
Total expenditures incurred (QRE plus non-QRE)	\$ _____
Qualified expenditure period: Start date _____	End date _____

4. **Adjusted basis on the first day the qualified rehab plan commenced** \$ _____

5. **Project completion/placed in service date** \$ _____

6. **Certification of costs** \$ _____

I hereby certify the above expenses for the total project, the qualified rehabilitation expenditures (QREs), and the non-qualified rehabilitation expenditures, and that the total of QREs incurred between January 1, 2019 and December 31, 2028 exceeds the adjusted basis value of the historic structure on the first day the qualified rehabilitation plan commenced. This is a third-party certification conducted by a CPA, and appropriate examination was carried out. My examination was conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants and, accordingly, include examining, on a test basis, evidence supporting the calculation of QREs and performing such other procedures as I considered necessary in the circumstances. I believe that my examination provides a reasonable basis for the opinions expressed herein. In my professional opinion, the project's total QREs were calculated using the accrual method of accounting and determined in accordance with Section 47 of the Internal Revenue Code of 1986, as amended. I attest that my CPA license/certificate number is active and that there have been no enforcement, non-compliance or disciplinary actions taken against me by any relevant state licensure boards. I attest that the above information is true to the best of my knowledge and belief.


Name of CPA _____ Signature _____
Firm _____ CPA License # _____ Date _____
Street _____ City _____
State _____ Zip _____ Phone _____ Email _____

IDNR office use only

Part 3 approved by NPS? Y/N Date _____
Allocation amount(s) _____ QREs and _____ Date(s) _____
Issuance fee to be requested \$ _____ credits eligible for issuance
Date fee requested _____
Date fee collected _____

IL-HTC Certification of Qualified Rehabilitation Expenditures

- Third-party CPA fills out and signs Sections 3 through 6

 THE ILLINOIS DEPARTMENT OF NATURAL RESOURCES
ILLINOIS HISTORIC PRESERVATION TAX-CREDIT PROGRAM
CERTIFICATION OF QUALIFIED REHABILITATION EXPENDITURES

FEDERAL PROJECT NUMBER _____ DATE OF NPS CERTIFICATION OF PART-3 _____

1. **Name of property** _____
Street _____
City _____ County _____ Zip _____

2. **Owner** _____
I hereby attest that all information contained in this application, including the documentation, is true to the best of my knowledge and belief. I am granting the State of Illinois access to material, documentation and other data required to verify application information.
Name _____ Signature _____
Organization _____ FEIN _____
Street _____ City _____
State _____ Zip _____ Phone _____ Date _____
Email _____

3. **Expenditures**

Total of qualified rehabilitation expenditures (QRE)	\$ _____
Total of QRE incurred between 1/1/2019—12/31/2028	\$ _____
Total of non-qualified rehabilitation expenditures (non-QRE)	\$ _____
Total expenditures incurred (QRE plus non-QRE)	\$ _____
Qualified expenditure period: Start date _____	End date _____

4. **Adjusted basis on the first day the qualified rehab plan commenced** \$ _____

5. **Project completion/placed in service date** \$ _____

6. **Certification of costs** \$ _____

I hereby certify the above expenses for the total project, the qualified rehabilitation expenditures (QREs), and the non-qualified rehabilitation expenditures, and that the total of QREs incurred between January 1, 2019 and December 31, 2028 exceeds the adjusted basis value of the historic structure on the first day the qualified rehabilitation plan commenced. This is a third-party certification conducted by a CPA, and appropriate examination was carried out. My examination was conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants and, accordingly, include examining, on a test basis, evidence supporting the calculation of QREs and performing such other procedures as I considered necessary in the circumstances. I believe that my examination provides a reasonable basis for the opinions expressed herein. In my professional opinion, the project's total QREs were calculated using the accrual method of accounting and determined in accordance with Section 47 of the Internal Revenue Code of 1986, as amended. I attest that my CPA license/certificate number is active and that there have been no enforcement, non-compliance or disciplinary actions taken against me by any relevant state licensure boards. I attest that the above information is true to the best of my knowledge and belief.


Name of CPA _____ Signature _____
Firm _____ CPA License # _____
Street _____ City _____
State _____ Zip _____ Phone _____ Date _____
Email _____

IDNR office use only

Part 3 approved by NPS? Y/N Date _____
Allocation amount(s) _____ QREs and _____ Date(s) _____
Issuance fee to be requested \$ _____ credits eligible for issuance _____
Date fee requested _____
Date fee collected _____

IL-HTC Certification of Qualified Rehabilitation Expenditures

- Total QREs
- Total QREs on or after 1/1/19
- Total non-QREs
- QRE + non-QRE
- Expenditure period
- Adjusted basis at project start



 THE ILLINOIS DEPARTMENT OF NATURAL RESOURCES
ILLINOIS HISTORIC PRESERVATION TAX-CREDIT PROGRAM
CERTIFICATION OF QUALIFIED REHABILITATION EXPENDITURES

FEDERAL PROJECT NUMBER _____ DATE OF NPS CERTIFICATION OF PART-3 _____

1. **Name of property** _____
 Street _____
 City _____ County _____ Zip _____

2. **Owner** _____
 I hereby attest that all information contained in this application, including the documentation, is true to the best of my knowledge and belief. I am granting the State of Illinois access to material, documentation and other data required to verify application information.

Name _____ Signature _____
 Organization _____ FEIN _____
 Street _____ City _____ Date _____
 State _____ Zip _____ Phone _____ Email _____

3. **Expenditures**

Total of qualified rehabilitation expenditures (QRE)	\$ _____
Total of QRE incurred between 1/1/2019—12/31/2028	\$ _____
Total of non-qualified rehabilitation expenditures (non-QRE)	\$ _____
Total expenditures incurred (QRE plus non-QRE)	\$ _____
Qualified expenditure period: Start date _____	End date _____

4. **Adjusted basis on the first day the qualified rehab plan commenced** \$ _____

5. **Project completion/placed in service date** \$ _____

6. **Certification of Costs**

I hereby certify the above expenses for the total project, the qualified rehabilitation expenditures (QREs), and the non-qualified rehabilitation expenditures, and that the total of QREs incurred between January 1, 2019 and December 31, 2028 exceeds the adjusted basis value of the historic structure on the first day the qualified rehabilitation plan commenced. This is a third-party certification conducted by a CPA, and appropriate examination was carried out. My examination was conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants and, accordingly, include examining, on a test basis, evidence supporting the calculation of QREs and performing such other procedures as I considered necessary in the circumstances. I believe that my examination provides a reasonable basis for the opinions expressed herein. In my professional opinion, the project's total QREs were calculated using the accrual method of accounting and determined in accordance with Section 47 of the Internal Revenue Code of 1986, as amended. I attest that my CPA license/certificate number is active and that there have been no enforcement, non-compliance or disciplinary actions taken against me by any relevant state licensure boards. I attest that the above information is true to the best of my knowledge and belief.

Name of CPA _____ Signature _____
 Firm _____ CPA License # _____
 Street _____ City _____
 State _____ Zip _____ Phone _____ Email _____

IDNR office use only

Part 3 approved by NPS? Y/N Date _____
 Allocation amount(s) _____ QREs and _____ Date(s) _____
 Issuance fee to be requested \$ _____ credits eligible for issuance
 Date fee requested _____
 Date fee collected _____

IL-HTC Certification of Qualified Rehabilitation Expenditures

- Complete it
- Print it
- Sign it
- Scan it
- Email it to your project reviewer



 THE ILLINOIS DEPARTMENT OF NATURAL RESOURCES
ILLINOIS HISTORIC PRESERVATION TAX-CREDIT PROGRAM
CERTIFICATION OF QUALIFIED REHABILITATION EXPENDITURES

FEDERAL PROJECT NUMBER _____ DATE OF NPS CERTIFICATION OF PART-3 _____

1. **Name of property** _____
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2. **Owner** _____
 I hereby attest that all information contained in this application, including the documentation, is true to the best of my knowledge and belief. I am granting the State of Illinois access to material, documentation and other data required to verify application information.
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Total of qualified rehabilitation expenditures (QRE)	\$ _____
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Total expenditures incurred (QRE plus non-QRE)	\$ _____
Qualified expenditure period: Start date _____	End date _____

4. **Adjusted basis on the first day the qualified rehab plan commenced** \$ _____

5. **Project completion/placed in service date** \$ _____

6. **Certification of costs** \$ _____

I hereby certify the above expenses for the total project, the qualified rehabilitation expenditures (QREs), and the non-qualified rehabilitation expenditures, and that the total of QREs incurred between January 1, 2019 and December 31, 2028 exceeds the adjusted basis value of the historic structure on the first day the qualified rehabilitation plan commenced. This is a third-party certification conducted by a CPA, and appropriate examination was carried out. My examination was conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants and, accordingly, include examining, on a test basis, evidence supporting the calculation of QREs and performing such other procedures as I considered necessary in the circumstances. I believe that my examination provides a reasonable basis for the opinions expressed herein. In my professional opinion, the project's total QREs were calculated using the accrual method of accounting and determined in accordance with Section 47 of the Internal Revenue Code of 1986, as amended. I attest that my CPA license/certificate number is active and that there have been no enforcement, non-compliance or disciplinary actions taken against me by any relevant state licensure boards. I attest that the above information is true to the best of my knowledge and belief.

Name of CPA _____ Signature _____
 Firm _____ CPA License # _____
 Street _____ City _____
 State _____ Zip _____ Phone _____ Email _____

IDNR office use only

Part 3 approved by NPS? Y/N Date _____
 Allocation amount(s) _____ QREs and _____ Date(s) _____
 Issuance fee to be requested \$ _____ credits eligible for issuance
 Date fee requested _____
 Date fee collected _____

SHPO review of IL-HTC Certification of QREs

- Missing data and signatures
- Mathematical errors
- Issues with CPA attestation, license number, or status
 - SHPO will confirm CPA's status through CPAVerify and state licensure or professional regulation boards



The screenshot shows the CPAVerify website homepage. At the top, there is a navigation bar with the CPAVerify logo (a blue circle with a white checkmark) and the text "CPAVerify". Below the logo, the navigation menu includes: "START SEARCH", "ABOUT US", "PARTICIPATING STATES", "CONTACT BOARDS", "FILE A COMPLAINT", "TERMS & CONDITIONS", and "HOME".

On the left side, there is a testimonial box with a quote: "HR Directors have been looking for a way to ensure that someone who interviews - and lists CPA as a designation - is a verified professional. Can CPAVerify help me with this process?" Below the quote, it says "ANSWER: Yes, CPAVerify can be used to verify the status of a CPA." At the bottom of this box is a "START SEARCH" button with a magnifying glass icon.

The main content area features a "Welcome" heading. Below it, there is a paragraph: "Free and open to the public, CPAVerify.org is a CPA lookup tool populated by official state regulatory data sent from Boards of Accountancy to a central database. The website represents the first ever single-source national database of licensed CPAs and CPA firms. Determine a CPA or CPA firm's credentials without having to search each of the 55 Boards of Accountancy website individually." Below this paragraph, it says: "Additionally, CPAVerify.org also includes markers of enforcement, non-compliance or disciplinary action for added confidence in hiring a CPA." Below that, it lists several advantages of CPAVerify:

- Giving the public confidence in hiring a CPA for personal or business purposes
- Assisting accounting firms in tracking their employees' license renewal dates
- Giving hiring managers a quick and easy way to verify pre-hire credentials
- Dissuading fraudulent use of the CPA designation while simultaneously promoting its value

In the background of the main content area, there is a photograph of four business professionals (three men and one woman) gathered around a table, looking at a laptop screen.

IL-HTC Acceptance Letter

- If SHPO accepts your completed Certification of QREs, it will email the applicant a letter that:
 - Accepts the form
 - States the amount of issuable IL credit
 - Requests issuance fee (= 2% of value of IL credit)
- Mail check payable to IDNR with the NPS project number in the memo line to:
 - Illinois Department of Natural Resources
 - Attention: Carey L. Mayer
 - One Natural Resources Way
 - Springfield, Illinois 62702-1271

IL-HTC Acceptance Letter

- Remember: Allocation \neq tax credit
- A project could receive less credit than allocated:
 - If 25% of certified QREs $<$ Allocation, then:
IL-HTC = 25% of certified QREs
 - “Over-allocations” will be added to the program’s current allocation total
- A project could receive less credit than eligible:
 - If Allocation $<$ 25% of certified QREs, then:
IL-HTC = Allocation
 - Project can apply for balance in subsequent rounds

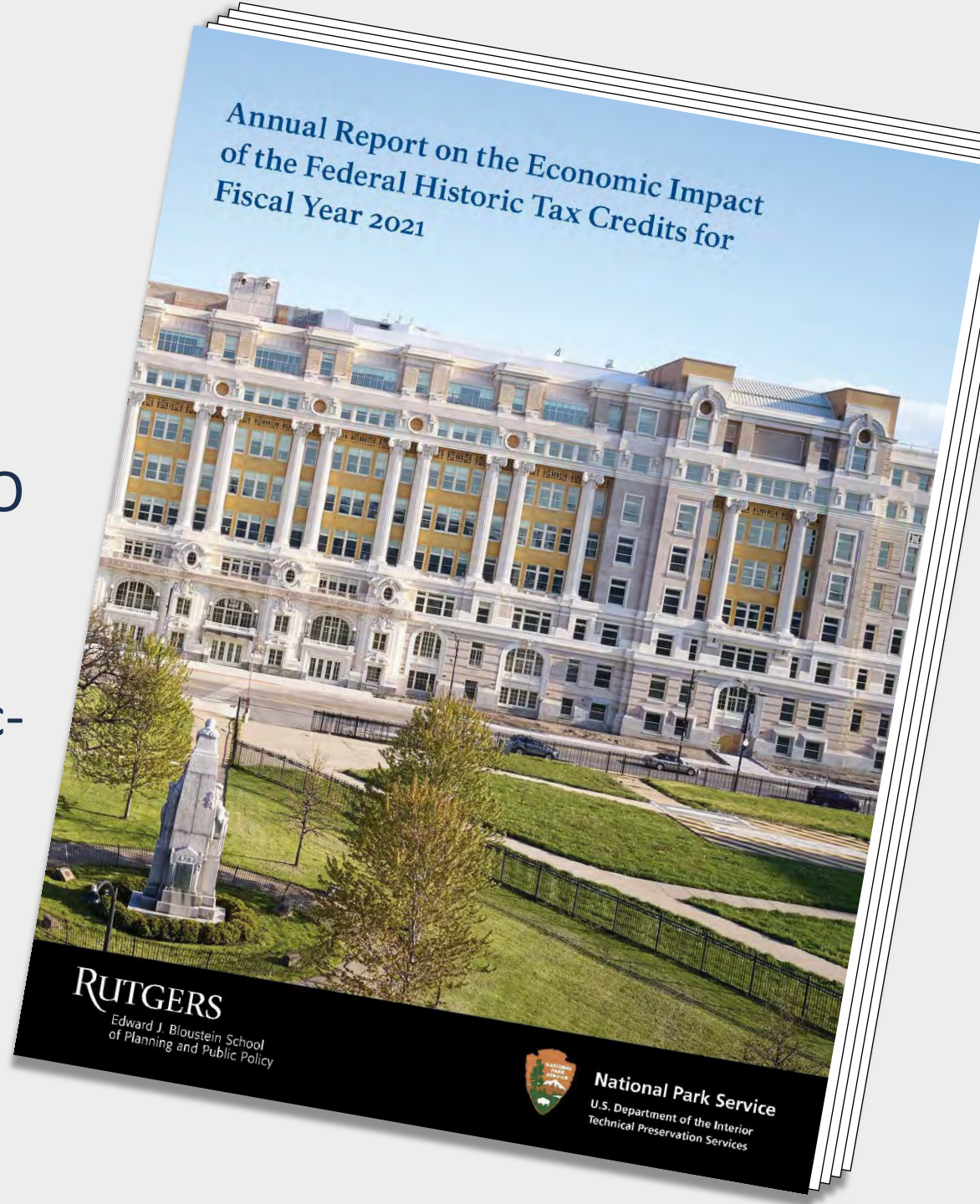
What if the project received an allocation but...

- ...doesn't have NPS-certified Part 3?
- ...doesn't have a completed and signed IL-HTC Certification of Qualified Rehabilitation Expenditures form?
- ...post-1/1/19 QREs do not exceed adjusted basis?
- ...doesn't pay the issuance fee?

Answer: **No credit issued**

What's with the issuance fee?

- 35 ILCS 31/20.c requires that SHPO use the fee to commission biennial economic-impact reports



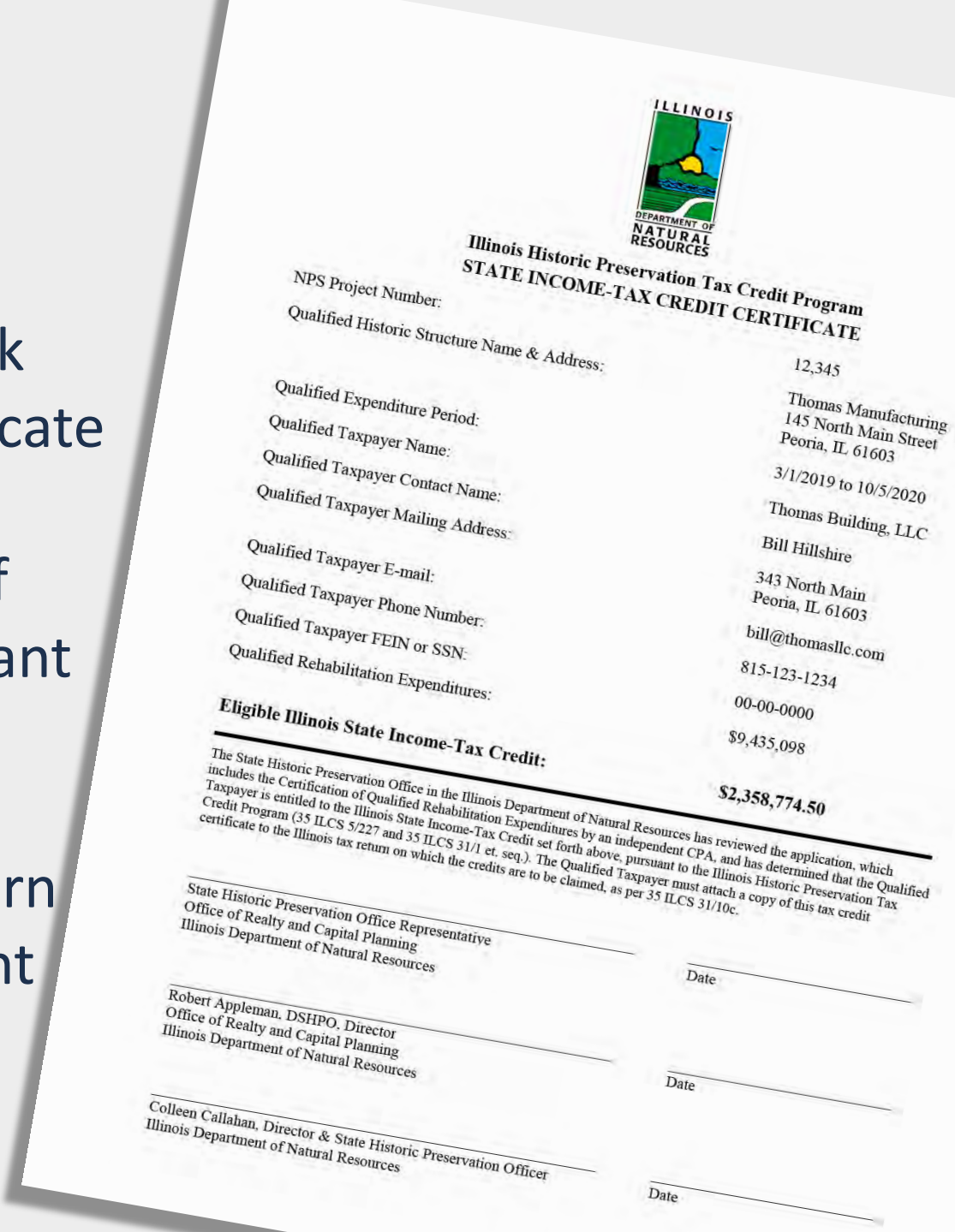
Economic Impact Report

- Published 5/1/2023
- Analyzes both IL-HTC and RE-HTC
- Available for download at <https://dnrhistoric.illinois.gov/preserve/statecredit-economic-impact.html>



IL-HTC Certificate

- SHPO deposits check then submits Certificate for signature
- SHPO emails scan of Certificate to applicant
- Applicant begins claiming on next or amended IL tax return
- Per statute, applicant must attach a copy to IL tax return



ILLINOIS
DEPARTMENT OF
NATURAL
RESOURCES

Illinois Historic Preservation Tax Credit Program
STATE INCOME-TAX CREDIT CERTIFICATE

NPS Project Number: _____

Qualified Historic Structure Name & Address: _____ 12,345
Thomas Manufacturing
145 North Main Street
Peoria, IL 61603

Qualified Expenditure Period: _____ 3/1/2019 to 10/5/2020

Qualified Taxpayer Name: _____ Thomas Building, LLC

Qualified Taxpayer Contact Name: _____ Bill Hillshire

Qualified Taxpayer Mailing Address: _____ 343 North Main
Peoria, IL 61603

Qualified Taxpayer E-mail: _____ bill@thomasllc.com

Qualified Taxpayer Phone Number: _____ 815-123-1234

Qualified Taxpayer FEIN or SSN: _____ 00-00-0000

Qualified Rehabilitation Expenditures: _____ \$9,435,098

Eligible Illinois State Income-Tax Credit: **\$2,358,774.50**

The State Historic Preservation Office in the Illinois Department of Natural Resources has reviewed the application, which includes the Certification of Qualified Rehabilitation Expenditures by an independent CPA, and has determined that the Qualified Taxpayer is entitled to the Illinois State Income-Tax Credit set forth above, pursuant to the Illinois Historic Preservation Tax Credit Program (35 ILCS 5/227 and 35 ILCS 31/1 et. seq.). The Qualified Taxpayer must attach a copy of this tax credit certificate to the Illinois tax return on which the credits are to be claimed, as per 35 ILCS 31/10c.

State Historic Preservation Office Representative
Office of Realty and Capital Planning
Illinois Department of Natural Resources
Date _____

Robert Appleman, DSHPO, Director
Office of Realty and Capital Planning
Illinois Department of Natural Resources
Date _____

Colleen Callahan, Director & State Historic Preservation Officer
Illinois Department of Natural Resources
Date _____

QUESTIONS?

Carol Dyson, AIA
217-524-0276
carol.dyson@illinois.gov

Anna Margaret Barris
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annamargaret.barris@illinois.gov

Darius Bryjka
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Anthony Rubano
217-782-7459
anthony.rubano@illinois.gov

<https://dnrhistoric.illinois.gov/preserve/statecredit.html>