

RESIDENT CURATOR PROGRAM
DRAFT INVITATION TO SUBMIT APPLICATION FOR CURATORSHIP

APPLICATION SUBMISSION

DUE DATE: before X:XXpm, Xxxxday, Xxxx, xx, 2016

The Fairfax County Park Authority (“FCPA”) invites interested parties to submit an application for the Curatorship of the **Ellmore Farmhouse at Frying Pan Farm Park** located at 2709 West Ox Road, Herndon, Virginia 20171.

Application Submittal Instructions

Submit five (5) copies of the completed Application by the due date to:
Fairfax County Park Authority
Resource Management Division
Attn: Denice Dressel, Historic Curatorship Project Manager
12055 Government Center Pkwy., Suite 406
Fairfax, Virginia 22035-0000
(703) 324-9569

Include on the face of the envelope the property’s name and address.

Review of applications will begin upon expiration of the due date. Therefore, applicants are strongly advised to submit their applications on time to ensure consideration by FCPA. The Invitation to Submit Application (“ISA”) consists of **XX** pages. Applicants should examine the ISA and its table of contents to ensure that all pages are included. FCPA assumes no responsibility for an application submitted on the basis of an incomplete ISA package.

Applicants are expected to review all requirements and instructions and furnish all information required by this ISA. Failure to do so will be at the Applicant's risk. FCPA reserves the right to waive formalities in any Application, and may, if it determines that such action is in the best interests of the County, select an Application which does not conform in all details with the requirements of this ISA. Likewise, the County reserves the right to reject any and all Applications.

This ISA does not commit the County of Fairfax to enter into any disposition of real property interest; or to pay any costs, including costs associated with any studies or designs, incurred by any party in the preparation and submission of an Application.

A hard copy of this application can be obtained from the project manager upon request.

Applications will not be returned and will be retained in the records of FCPA subject to the document retention policies of the Library of Virginia.

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INQUIRIES AND EXPLANATIONS

All inquiries concerning this ISA should be directed, in writing, to:

Fairfax County Park Authority
Resource Management Division
Attn: Denice Dressel, Historic Curatorship Project Manager
12055 Government Center Pkwy., Suite 406
Fairfax, Virginia 22035-0000
Denice.Dressel@Fairfaxcounty.gov
(703) 324-9569

Any explanation desired by an applicant regarding the meaning or interpretation of this ISA must be submitted and received in writing seven (7) business days prior to the Application Due Date to allow sufficient time for a reply to reach the Applicant prior to the submission of their Application. Verbal explanations or instructions shall not be binding on the Park Authority.

APPLICATION

Applications must follow the outline and supply all of the information requested below, and demonstrate the ability of the potential Curator to undertake a challenging and complex assignment. Applications must be feasible and should reflect an understanding of the historic qualities of the property and their value. It is intended that the substance of an Application, as approved by FCPA and the County, will be incorporated into all agreements. A cover letter is required with all Applications.

Applications must include responses to all sections of this ISA. If a section does not apply, indicate “not applicable” in your response. Provide responses in the provided spaces and attach additional sheets or documentation as necessary.

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APPLICANT INFORMATION

List the names, addresses and telephone numbers of each individual applicant, or all principals, partners, members or shareholders.

Applicant's Name		
Address		
City	State	Zip
Email		Telephone

Additional Applicant's Name, if applicable		
Address		
City	State	Zip
Email		Telephone

Additional Applicant's Name, if applicable		
Address		
City	State	Zip
Email		Telephone

Additional Applicant's Name, if applicable		
Address		
City	State	Zip
Email		Telephone

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PROPOSED USE

Provide a narrative summary of the proposed use of this property. Be sure to describe how the proposed use is compatible with:

- The long-term preservation of the Ellmore Farmhouse and its associated cultural landscape;
- FCPA's mission and management of Frying Pan Farm Park;
- The surrounding neighborhoods;
- The historic value of the Ellmore Farmhouse; and
- The agricultural heritage of Frying Pan Farm Park

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PUBLIC BENEFIT

The Resident Curatorship Enabling Legislation requires reasonable public access consistent with the property's nature and use. Describe the scope and nature of the all public access, and any projects / programs / services that will fulfill meet this requirement.

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REHABILITATION AND MAINTENANCE PLAN SUMMARY

Curatorship terms are comprised of a Rehabilitation Phase and a Maintenance Phase. The Rehabilitation Phase involves the major improvements required by contract. The Maintenance Phase follows for the term of the lease, and includes all routine maintenance of the property, as well as any major capital improvements necessary during the term of the lease.

Work Plan with General Schedule

Describe how the Applicant will carry out the rehabilitation and maintenance phases of the project, including the required improvements listed in **Section X**. Include a general schedule with milestones for improvements. The selected Curator will develop a detailed schedule of improvements that will be included in the lease.

Proposed Alternatives or Amendments to Required Improvements

Describe any proposed amendments to the required improvements, found in **Section X**, and provide justification.

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Description and Documentation of Donations

Describe in detail all labor, material, or services proposed to be donated by any third party sources. Written commitments for such labor, material, or services must be provided as an attachment to the application.

Sustainability

Describe any proposed environmentally sustainable building technology and practices that will be used in the rehabilitation, maintenance, and/or operation of the property.

Accessibility

All proposed curatorships must comply with applicable requirements of the Americans with Disabilities Act. Describe how the rehabilitation, operation, and maintenance of the property will address applicable accessibility regulations required by the Americans with Disabilities Act.

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EXPERIENCE AND QUALIFICATIONS

Applicant's General Qualifications

Provide a narrative summary of the applicant's experience and qualifications to undertake, implement and manage the rehabilitation, reuse and maintenance of the historic property. Include the applicant's resume or CV, and references to support such experience and qualifications. Supplemental material describing pertinent projects, including visual aids, is encouraged but not required.

Applicant's Specialized Skill in Historic Preservation

Describe the applicant's specialized skills in historic preservation projects, including any relevant experience with the Secretary of the Interior's Standards for the Treatment of Historic Properties, 36 CFR Part 68 (2013), as amended ([Appendix X](#)).

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Professional Service Providers' General Qualifications

If available at this time, provide the professional qualifications and relevant work history of any professional service providers, contractors or subcontractors, including, but not limited to architects, general contractors, and subcontractors such as plumbers, electricians, etc.

Professional Service Providers' Qualifications in Historic Preservation

If available at this time, provide the professional qualifications and relevant work history of any professional service providers, contractors or subcontractors, including, but not limited to architects, general contractors, and subcontractors such as plumbers, electricians, etc. pertaining to the Secretary of the Interior's Standards for the Treatment of Historic Properties, 36 CFR Part 68 (2013), as amended ([Appendix X](#)).

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REHABILITATION PHASE - ESTIMATED PROJECT COSTS

Use the table below to summarize expected costs (attach more detailed breakdowns if desired).

CAPITAL COSTS BUDGET		
Cost Category	Amount	Total Amount
Hard Costs		\$0.00
General Conditions (mobilization, temp. facilities)	\$0.00	
Site Work	\$0.00	
Excavation	\$0.00	
Foundation	\$0.00	
Demolition	\$0.00	
Superstructure	\$0.00	
Floor Structure	\$0.00	
Roof Structure & Cover	\$0.00	
Doors & Windows	\$0.00	
Interior Construction	\$0.00	
Plumbing	\$0.00	
HVAC	\$0.00	
Electrical	\$0.00	
Sprinklers	\$0.00	
Conveying Systems	\$0.00	
Utility Upgrades (electrical, water, sanitary)	\$0.00	
HAZMAT Abatement	\$0.00	
Specialties	\$0.00	
Clean up	\$0.00	
Miscellaneous	\$0.00	
Construction Contingency (%)	0.00%	
Soft Costs		\$0.00
Architectural Fees	\$0.00	
Engineering Fees	\$0.00	
Third party HAZMAT inspection, testing, and monitoring	\$0.00	
Other Design Fees	\$0.00	
Commissioning HVAC, sanitation systems	\$0.00	
Construction Period Interest	\$0.00	
Other Financing Fees	\$0.00	
Other Consulting Fees	\$0.00	
Permits and Licenses	\$0.00	
Construction Administration fees	\$0.00	
Other Soft Costs	\$0.00	
Design Contingency (%)	0.00%	
Other Capital Costs	\$0.00	\$0.00
TOTAL CAPITAL COSTS		\$0.00

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MAINTENANCE PHASE EXPENSES

Curators are credited for the ongoing maintenance of the property (assuming all required maintenance tasks are being performed according to the guidelines established in [Appendix X](#)). The Curator is credited an additional annual amount, to recognize the value of the occupation and management of the property (utilities, fees, any applicable taxes, etc.).

Annual Maintenance Allowance

Including, but not limited to: grounds maintenance, gutter cleaning, roof repairs/replacement, repointing, maintaining/replacing mechanical systems, etc. (See Appendix X)

2013 Historic Replacement Value	Multiply the Historical Replacement Value by 1%	Total Annual Maintenance Expense Allowance
\$(TBD by FCPA)	1%	\$(TBD by FCPA)

Annual Occupancy/Management Allowance

For example: Utilities, additional required liability insurance, legal fees, public benefit component; property taxes, etc.

Utilities	\$(TBD by FCPA)
Real Estate Taxes	\$(TBD by FCPA)
Other Miscellaneous Expenses	\$(TBD by FCPA)
Total Annual Occupancy and Management Allowance	\$(TBD by FCPA)

Total Annual Maintenance Phase Expense Allowance

Annual Maintenance Expense Allowance	\$(TBD by FCPA)
Total Annual Occupancy and Management Allowance	\$(TBD by FCPA)
Total Annual Maintenance Phase Expense Allowance	\$(TBD by FCPA)

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LEASE TERM

According to the Curatorship Program's Enabling Legislation, FCPA must establish a Fair Market Rental Value (FMRV) for the property. For the purposes of this solicitation, FCPA is establishing a rent value of \$XXXXXX per annum for the length of the base term, as determined by an independent appraiser. For the Ellmore Farmhouse property, the length of the lease term will be determined based upon the following:

- Annual Fair Market Rental Value (FMRV)
- Rehabilitation Project Costs
- Annual Maintenance Allowance: long-term capital expenditures beyond rehabilitation, and maintenance costs, including on-going maintenance expenses such as routine property maintenance as outlined in Appendix XXXX
- Annual Occupancy and Management Allowance: includes utilities, insurance, legal fees, public benefit component; property taxes, etc.

Formula:

Annual Fair Market Rental Value *minus* Annual Maintenance Allowance *minus* Annual Occupancy and Management Allowance *equals* Adjusted Annual Fair Market Rental Value.

Total Rehabilitation Project Costs *divided by* Adjusted Annual Fair Market Rental Value *equals* Estimated Lease Term, in years.

	Annual	Total
Rehabilitation Project Costs (Total Capital Costs, see Section X)		\$
Annual Fair Market Rental Value (FMRV)	\$TBD FCPA	
Annual Maintenance Allowance (see Section X)	\$(TBD FCPA)	
Annual Occupancy & Management Allowance (see Section X)	\$(TBD FCPA)	
Adjusted Annual FMRV (FMRV - Allowances)	\$TBD FCPA	
Rehabilitation Project Costs /Adjusted FMRV = Estimated Length of Lease, or Lease Term, in years		

Insert the estimated cost of your rehabilitation plan into this formula and state the estimated lease term. Please describe any considerations that you wish for FCPA to make in the negotiation of the lease term.

Estimated Lease Term, in years _____

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FINANCING PLAN

This section is used to determine the financial viability of the application. All information will remain confidential, *to the extent permitted by law*. In particular, please provide the following information:

Narrative Statement of Financial Capacity

Describe how the applicant intends to finance the rehabilitation, reuse, and ongoing maintenance of the property. Specifically, describe how each of the following will be financed:

- all of the pertinent tasks listed in the Conditions Reports (Appendix X)
- any proposed alternate tasks not listed in the Conditions Report (Appendix X)
- any additional proposed improvements
- all maintenance costs (Section X)
- all management costs (soft costs) related to proposed reuse (utilities, insurance, legal costs, fees, contingencies, etc.)

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Personal Financial Statement

Complete this form for each applicant, principals, partners, members or shareholders listed in Section X List only those assets you want to be considered in this personal financial statement.			
Name		Business Phone	
Address		Residence Phone	
City, State, & Zip Code			
ASSETS	(Omit Cents)	LIABILITIES	(Omit Cents)
Cash on hand & in Banks	\$	Accounts Payable	\$
Savings Accounts	\$	Notes Payable to Banks and Others (Describe in Section 2)	\$
IRA or Other Retirement Account	\$		
Accounts & Notes Receivable	\$	Installment Account (Auto)	\$
Life Insurance-Cash Surrender Value Only (Complete Section 8)	\$	Mo. Payments	\$
		Installment Account (Other)	\$
Stocks and Bonds (Describe in Section 3)	\$	Mo. Payments	\$
		Loan on Life Insurance	\$
Real Estate (Describe in Section 4)	\$	Mortgages on Real Estate or Rent listed per month(Describe in Section 4)	\$
Automobile-Present Value	\$	Unpaid Taxes (Describe in Section 6)	\$
Other Personal Property (Describe in Section 5)	\$	All other Liabilities such as liens, judgments (Describe in Section 7)	\$
Other Assets (Describe in Section 5)	\$		
Total	\$	Net Worth	\$
Section 1. Source of Income		Total	
Section 1. Source of Income		Contingent Liabilities	
Salary	\$	As Endorser or Co-signer	\$
Net Investment Income	\$	Legal Claims & Judgments	\$
Real Estate Income	\$	Other contingent liabilities not listed.	\$
Other Income (Describe below)*	\$		\$

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Description of Other Income in Section 1.* Source	Annual Income Amount

*NOTE: Alimony or child support payments do not need to be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.

Section 2: Loans Payable to Banks and Others
List loans, mortgages, credit card accounts, and other indebtedness. (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)

Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (Monthly, etc.)	How Secured or Endorsed Type of Collateral if applicable.

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Section 3. Stocks and Bonds. (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed).

Number of Shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value

Section 4. Real Estate Owned. (List each parcel separately. Use attachment if necessary. Each attachment must be identified as a part of this statement and signed.)

	Property A	Property B	Property C
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name of Mortgage Holder			
Mortgage Balance			
Amount of Payment per Month/Year			
Status of Mortgage			

**Section 5. Other Personal Property and Other Assets
(Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms payment and if delinquent, describe delinquency)**

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Section 6. Unpaid Taxes. (Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.

Section 7. Other Liabilities. (Describe in detail.)

Section 8. Life Insurance Held. (Give face amount and cash surrender value of policies - and name of insurance company

Complete IRS Form 4506-T, Request for Transcript of Tax Return (Appendix X), for each applicant listed in Section X, or corporate entity listed in Section X, for the previous three (3) years.

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Estimated Funding Sources

Please detail the projected funding sources. Documentation supporting each funding source should be attached to the application, including formal written commitments for any donated funding, labor, materials, or services from the party making the donation.

Equity (note sources below)	\$
	\$
	\$
	\$
Financing (note sources below)	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
Other Sources(note sources below)	\$
	\$
	\$
	\$
TOTAL PROJECTED FUNDING:	\$
TOTAL PROPOSED COSTS (from Section X)	\$

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Bank References

Lending Institution	Name of Lender	Address	Phone

Bankruptcy Disclosure

If the Applicant or any affiliated business entity of the Applicant or any of the entity's officers, principal, or investors has been adjudged bankrupt, either voluntarily or involuntarily, within the last ten years, please note the date and the judgment, the Court where the judgment was taken, and the names of all debtors joined in the bankruptcy petition.

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ORGANIZATIONAL STRUCTURE (IF APPLICABLE)

If the Applicant is acting officially on behalf of an organization, please describe fully the nature of the organization, including:

The Legal Structure and IRS Designation of Organization: (Corporation, LLC, JV, LP, 501(c), etc.)

Nature of the Business

The Legal History of the Organization: Attach a copy of all incorporating documents, including articles of incorporation, by-laws, operating agreements, trust agreements, etc.

Certificate of Good Standing: Attach Certificate of Good Standing (Corporation) or a Certificate of Fact of Existence (LLC)

If Applicant's proposal contemplates operating a business at the property, please note the following requirements:

License Requirement:

All firms doing business in Fairfax County shall obtain a license as required by Chapter 4, Article 7.2, of The Code of the Fairfax County, Virginia, as amended, entitled "Business, Professional and Occupational Licensing (BPOL) Tax." Questions concerning the BPOL Tax should be directed to the Department of Tax Administration, telephone (703) 222 8234 or visit: http://www.fairfaxcounty.gov/dta/business_tax.htm.

Registering Of Corporations:

In accordance with Virginia Code Section 13.1 758, any foreign corporation transacting business in Virginia shall secure a certificate of authority as required by Section 13.1-757 of the Code of Virginia, as amended, from the State Corporation Commission, Post Office Box 1197, Richmond, Virginia 23209.

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I hereby certify that I have filed all state tax returns, have paid all state taxes required under law, and am not in arrears to the County of Fairfax on debt or contract, am not a defaulter on surety to the County of Fairfax and my County taxes and/or assessments are not delinquent.

Signed under the pains and penalties of perjury on this _____ day of _____ 20____

SIGNATURE

FEDERAL TAX ID NO.

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DISCLOSURE OF BENEFICIALLY INTERESTED PARTIES

I hereby state, under the penalties of perjury, that the true names and addresses of all persons who have or will have a direct or indirect beneficial interest (including the amount of their beneficial interest accurate to within one-tenth percent) in the proposed project are listed below:

Name		Percentage Interest	
Address			
City	State		Zip
Email			Telephone

Name		Percentage Interest	
Address			
City	State		Zip
Email			Telephone

Name		Percentage Interest	
Address			
City	State		Zip
Email			Telephone

Name		Percentage Interest	
Address			
City	State		Zip
Email			Telephone

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The undersigned also acknowledges and states that none of the above-listed individuals have participated in the capacity of an officer or employee of the Fairfax County Government in the evaluation process of the Curator Application or Lease Transaction.

I hereby state, under the penalties of perjury, that the names and addresses of all the firms and personal corporations employing attorneys, real estate brokers, architects, engineers, planners, and surveyors, and all other agents who have acted on behalf of any of the foregoing with respect to this application are listed in **Section X**, above.

SIGNED under the penalties of perjury.

Signature

Date