



# STATE OF ILLINOIS

**ROD R. BLAGOJEVICH**  
**GOVERNOR**

## **FIRE TRUCK REVOLVING LOAN PROGRAM** **LOAN APPLICATION FORM**

Administered by



**Office of the State Fire Marshal**  
**Peter F. Viña, State Fire Marshal**  
1035 Stevenson Drive  
Springfield, Illinois 62703  
(217) 785-0969  
Fax: (217) 782-1062



**Illinois Finance Authority**  
**Ali Ata, Director**  
233 South Wacker Drive, Suite 4000  
Chicago, Illinois 60606  
(312) 627-1434  
Fax: (312) 496-0578

**APPLICATION DEADLINE: MARCH 15, 2004**

## **ILLINOIS FIRE TRUCK REVOLVING LOAN PROGRAM PROGRAM GUIDANCE**

The purpose of this program is to provide interest-free loans directly to local units of government for the purchase of fire trucks by a fire department, fire protection district or township fire department. These loans, which may not exceed \$250,000 to any fire department or fire protection district, have a maximum repayment period of 20 years, with a minimum repayment of 5 percent of the principal each year.

The authority for this program was first created in the *Rural Bond Bank Act* (30 ILCS 360/3-27); these duties and authority were transferred to the Illinois Finance Authority in the *Illinois Finance Authority Act* (PA 93-0205, effective January 1, 2004). In state fiscal year 2004, the General Assembly authorized a total of \$10,000,000 to carry out activities of this Revolving Loan Program.

Eligible applicants for the Fire Truck Revolving Loan Program are limited to Illinois fire departments as defined herein. An "Illinois fire department" is defined as a unit of local government (as defined in Article VII, Section 1 of the Illinois Constitution of 1970 and in 5 ILCS 70/1.28) in Illinois that provides fire suppression within a geographical area. Eligible applicants must also have participated in the National Fire Incident Reporting System (NFIRS) for a minimum of the previous two years.

Fire departments or fire stations that are for-profit entities, non-profit entities, associations, and/or not-for-profit corporations (i.e., that are not governmental bodies) are not eligible to apply for a loan under this program. Units of local government that do not operate fire departments are similarly not eligible (e.g., a municipality that contracts for fire suppression from another municipality or fire district).

### Program Priorities

This program is an innovative approach to a problem that has long caused difficulties for the fire services in Illinois, particularly those that have had hardships in generating the necessary revenue for major purchases such as fire trucks. The purpose is to allow eligible applicants the opportunity to purchase fire trucks. The priority is to replace old and obsolete fire trucks that are still in continuous service. A single loan amount may be used for more than one fire truck, if the department has that opportunity. Loans under this program may be used in combination with other funding sources; however, the purchase must remain in line with the original purpose of this program. Loans under this program may not be used to pay off existing loans on previously purchased fire trucks.

The review committee believes that the greatest benefit will be realized by making loans to fire departments that have either few or no operational fire trucks, as opposed to departments with numerous vehicles. Also, more consideration will be given to departments with an aging firefighting fleet and to departments wishing to replace an older, high-mileage vehicle or a vehicle that has sustained a high number of responses. The loan program may be used to purchase used and refurbished fire trucks; however, the

term of the loan may be less than 20 years, depending upon the estimated life of the vehicle.

### Application Procedure

Eligible applicants should send in their application forms to the Office of the State Fire Marshal. One individual should be designated as the primary contact and authorized representative of the department. The individual selected as a department's authorized representative is left to the discretion of each department. Requested information will include background and contact information, budget information and assurances and certifications. The application will also include questions about your department and community, as well as questions on your proposed fire truck purchase. Any questions regarding the Fire Truck Revolving Loan Program or the Application may be directed to the Chief of Staff at the Office of the State Fire Marshal.

You will be required to answer a series of questions designed to provide general information about your department and community's needs. You will also need to provide a copy of the two most recent audits (and/or income and expense reports) for your unit of local government as part of this application, as well as information on from where loan repayment funds will come. If repayment plans are based on charitable contributions (local fundraisers, for example), then you will need to provide an history of amounts raised in prior years.

### Evaluation Process

The review committee will rank all complete and eligible applications based on the answers provided to the questions in this application. Applications that best address the program's priorities will score higher than those not directed toward the priorities. The committee will use your narrative and answers to evaluate the application and determine ranking.

When reviewing your application, the committee will evaluate the clarity of your submission, the need for the fire truck (e.g., replacing an older, high-mileage vehicle or adding another vehicle to the existing fleet), repayment feasibility based on most recent completed audit and both a repayment plan and backup repayment plan. All applications will be reviewed in their entirety. Preference will be given to requests for vehicles that are made in the United States.

During the review process, you may be contacted for additional information. Processing your loan application will be delayed until the requested information is received.

After review by the committee, the ranked applications will be forwarded to the Illinois Finance Authority for evaluation of creditworthiness. The Illinois Finance Authority will then notify the committee which applicants have met the requirements for ability to repay the loan. Those applicants that receive final approval from the Illinois Finance Authority will be notified that their loan has been approved.

An appeals process for applications that are not approved will be established by rule. If you wish to appeal the decision of the review committee, a request for appeal must be received at the Office of the State Fire Marshal within 30 days of notification of denial of a loan. Denials based on creditworthiness alone may be appealed to the Illinois Finance Authority.

If your loan request is denied, you may apply again during the next period when loan applications are accepted.

#### Recipients' Responsibilities

Loan recipients must agree to the following:

1. Equipment purchased under this loan program will not be given to, loaned to, transferred to, leased to, or sold to any person or entity that is not eligible to participate in the loan program as an applicant. In addition, equipment purchased under this loan program may not be transferred to another entity during the term of the loan.
2. Retain loan files and supporting documentation for the term of the loan and three years after the conclusion and final payment on the loan.
3. Ensure that all procurement actions on new fire trucks are conducted in a manner that provides, to the maximum extent possible, open and free competition. In doing so, you must follow your established procurement processes when purchasing fire trucks with the loan funds. If you don't have established procedures, you should obtain at least two quotes/bids for the fire truck(s) you are procuring and document the process in your files.

Applicants are also encouraged to take advantage of group or bulk purchase programs, such as the new Bulk Purchase Program initiative between the Office of the State Fire Marshal and the Department of Central Management Services (CMS).

4. Continue to provide information, through established reporting channels, to the U.S. Fire Administration's National Fire Incident Reporting System (NFIRS).
5. Fire trucks purchased under this program will be insured, with the State of Illinois Fire Truck Revolving Loan Program as the loss payee for the life of the loan. Equipment titles will be held by the Illinois Finance Authority until the loan is fully repaid.
6. Fire Truck Revolving Loan Program proceeds are to be returned if any other funding (State or Federal) is received for the same purchase and is not supplementing the overall primary purchase. For example: the intended purchase costs \$375,000 and your department receives loan approval

(\$250,000) and a grant from the federal FIRE Act program (\$125,000). No money needs to be returned. However, if the vehicle costs \$250,000 and your department receives full loan approval and a FIRE Act grant, then you must reimburse the Loan Program in the amount of the FIRE Act grant. The refunded amount shall be at least equal to the amount of the additional funding.

7. Provide a primary and secondary repayment plan as part of the application. Recipients also agree to State intercept of funds, should the unit of local government become unable to make regularly scheduled loan repayments.

Application Deadline: The deadline for submitting an application to the Fire Truck Revolving Loan Program for state fiscal year 2004 is

**MARCH 15, 2004.**

## **OFFICIAL AGENCY MAILING ADDRESS UPDATE**

If your FIRE DEPARTMENT/DISTRICT official mailing address is different than that shown on the envelope, please complete this Change of Address form.

**PLEASE RETURN THIS FORM EVEN IF YOU ARE NOT APPLYING FOR A LOAN FROM THE FIRE TRUCK REVOLVING LOAN PROGRAM. THIS WILL ALLOW US TO UPDATE OUR FIRE DEPARTMENT ADDRESS FILE.**

**PLEASE PRINT OR TYPE:**

NAME OF FIRE AGENCY: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

AGENCY ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ COUNTY: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

**PLEASE RETURN ADDRESS CORRECTIONS TO:**

OFFICE OF THE STATE FIRE MARSHAL  
FIRE TRUCK REVOLVING LOAN PROGRAM  
1035 STEVENSON DRIVE  
SPRINGFIELD, ILLINOIS 62703-4259

**STATE OF ILLINOIS  
FIRE TRUCK REVOLVING LOAN PROGRAM  
OFFICE OF THE STATE FIRE MARSHAL  
1035 STEVENSON DRIVE  
SPRINGFIELD, ILLINOIS 62703**

**LOAN APPLICATION FORM**

<b>A. APPLICANT INFORMATION</b>		<b>FOR OSFM USE ONLY:</b> <b>APPLICATION #:</b> _____ -- _____	
1. Name and Mailing Address of Fire Department/District  Legislative District: SENATE _____ HOUSE _____		Has this department/district existed under a different name or merged with another company? YES <input type="checkbox"/> NO <input type="checkbox"/>  If YES, list previous name(s):	
2. Federal Employee ID Number	3. Local Government Unit Name: _____	4. Department/District Telephone Number PHONE: (    )	
2A. NFIRS FDID Number	Check Local Government Type: CITY <input type="checkbox"/> TOWNSHIP <input type="checkbox"/> VILLAGE <input type="checkbox"/> FIRE DISTRICT <input type="checkbox"/>	FAX: (    )	
2B. Most recent ISO Rating and Type (City, Rural, etc.)		5. County	
6. Name/Title of Contact Person for Application  E-Mail Address: _____		6A. Daytime Phone (8:00 AM to 5:00 PM Weekdays) WORK (    ) HOME (    )	

<b>B. GENERAL INFORMATION</b>		
7. Is the vehicle being purchased through the Fire Truck Revolving Loan Program a:		
<input type="checkbox"/> <b>NEW VEHICLE</b> Please provide the following (when available): * Title * Certification that vehicle meets current NFPA Standards * Performance Test	<input type="checkbox"/> <b>USED VEHICLE</b> Please provide the following: * Vehicle Identification Number * Copy of Title * Existing Liens * Certification that vehicle meets (or will meet) NFPA Standards * Performance Test * Photograph(s) of fire truck	<input type="checkbox"/> <b>REHABILITATED VEHICLE</b> Please provide the following: * Vehicle Identification Number * Copy of Title * Existing Liens * Certification that vehicle meets (or will meet) NFPA Standards * Performance Test * Photograph(s) of Vehicle
8. This fire truck is a(n): <input type="checkbox"/> REPLACEMENT <input type="checkbox"/> ADDITION to the existing fleet.		
9. TOTAL ESTIMATED COST: \$ _____		10. (Estimated) Delivery Date: _____
11. TOTAL AMOUNT OF LOAN REQUESTED: \$ _____		

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APPLICANT NAME: _____	<b>FOR OSFM USE ONLY:</b> APPLICATION #: _____ -- _____
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**C. LOAN JUSTIFICATION**

12. Detail reasons for requesting a loan under this program. Include information on out-of-date equipment, unsafe equipment, current demand for services, increased demand for services, etc. Include information on equipment losses that were not covered by insurance. Provide details on services provided in last two completed years for comparison purposes. Attach additional sheets if necessary. Please include information on all monetary and in-kind grants and sub-market rate loans received in the previous 5 years (including but not limited to dollar amount, source, interest rate, purpose of grant). Provide information about your most recent ISO rating. If applicable, include historical information on levy rates (including, but not limited to, the maximum rate, current rate, attempts to change the levy rate).

If replacing a vehicle, what are your plans for the vehicle being replaced?

**Is your department willing to participate in the Fire Equipment Exchange Program? YES  NO**

<b>APPARATUS</b>	<b>ALL NEW FIRE APPARATUS FINANCED THROUGH THE ILLINOIS FIRE TRUCK REVOLVING LOAN PROGRAM MUST MEET CURRENT NFPA STANDARDS. ALL USED FIRE APPARATUS FINANCED THROUGH THE ILLINOIS FIRE TRUCK REVOLVING LOAN PROGRAM MUST MEET THE APPLICABLE STANDARDS OF THE YEAR MADE. ALL REFURBISHED VEHICLES MUST MEET THE MOST RECENT NFPA STANDARDS.</b>
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13. Describe the new or used apparatus to be added to your fleet or to be acquired as a replacement for another vehicle.

YEAR: \_\_\_\_\_ MAKE/MODEL: \_\_\_\_\_ MODEL: \_\_\_\_\_

Tank Capacity (gal.): \_\_\_\_\_ Pump Capacity (gpm): \_\_\_\_\_ Ladder (ft.): \_\_\_\_\_

Date Purchased: \_\_\_\_\_ Odometer Reading: \_\_\_\_\_ VIN: \_\_\_\_\_

14. Describe the apparatus being replaced (if applicable).

YEAR: \_\_\_\_\_ MAKE/MODEL: \_\_\_\_\_ MODEL: \_\_\_\_\_

Tank Capacity (gal.): \_\_\_\_\_ Pump Capacity (gpm): \_\_\_\_\_ Ladder (ft.): \_\_\_\_\_

Date Purchased: \_\_\_\_\_ Odometer Reading: \_\_\_\_\_ VIN: \_\_\_\_\_

NOTE: Be sure to provide as much information as necessary for backup in Question #12 on the necessity for replacement.

15. Applicable NFPA standards which the vehicle being purchased meets/will meet: Standard \_\_\_\_\_ Edition \_\_\_\_\_

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APPLICANT NAME: _____	<b>FOR OSFM USE ONLY:</b> APPLICATION #: _____ -- _____							
16. Number of vehicles in fleet: _____ Please provide a listing of vehicles, using additional sheets as needed, with the following information:								
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;">YEAR</th> <th style="text-align: left; border-bottom: 1px solid black;">TYPE</th> <th style="text-align: left; border-bottom: 1px solid black;">MAKE/MODEL</th> <th style="text-align: left; border-bottom: 1px solid black;">YEAR PURCHASED</th> <th style="text-align: left; border-bottom: 1px solid black;">COST</th> <th style="text-align: left; border-bottom: 1px solid black;">ODOMETER</th> <th style="text-align: left; border-bottom: 1px solid black;"># RESPONSES</th> </tr> </thead> </table>		YEAR	TYPE	MAKE/MODEL	YEAR PURCHASED	COST	ODOMETER	# RESPONSES
YEAR	TYPE	MAKE/MODEL	YEAR PURCHASED	COST	ODOMETER	# RESPONSES		
17. DEMOGRAPHIC INFORMATION: Please provide information on the population served, the number of fire houses, the square mileage and other appropriate information. Use additional sheets if necessary.								
18. Other local governments served outside of your primary responsibility:  Is demographic information on this area (population, area, etc.) included in Question 17 above? YES <input type="checkbox"/> NO <input type="checkbox"/>								
19. MABAS Member: YES <input type="checkbox"/> NO <input type="checkbox"/> If NO, list any Fire Departments/Districts with which mutual aid agreements exist and provide copies of agreements:  _____								
<b>D. CERTIFICATION AND NOTARIZATION OF APPLICATION</b> (to be signed by President and Secretary of Board of Trustees, or by Mayor and Clerk, or highest elected official and clerk or secretary of the unit of local government)								

We, the undersigned and duly authorized officers of the \_\_\_\_\_ do hereby certify that the filing of this application was duly authorized, and that the statements made in this loan application and all exhibits, documents, and data submitted with this loan application are true and correct according to the best knowledge and belief of the undersigned, and are submitted as a basis for approval of a loan from the Illinois Fire Truck Revolving Loan Program in accordance with the provisions of Public Act 93-0035, approved June 24, 2003, as amended. As part of the loan process, the Office of the State Fire Marshal and the Illinois Finance Authority are hereby authorized to verify any information contained herein, and/or all credit or other references listed in this application.

DATE: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

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Signature

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