

The Great Update Rebate Application Checklist

The following items must be brought to the One-on-One Application Meeting:

1. **A completed Application Packet** which includes:
 - a. A signed copy of the **Residential Agreement**;
 - b. A signed and completed **The Great Update Rebate Application**;
 - c. A signed **Disclosure of Information on Lead-Based Paint and/or Lead-Based Paint Hazards**;
 - d. A complete **Job Estimate Form** for either work to be performed by a Contractor or work to be performed by the homeowner; and
2. Copies of the below **supporting documentation** needed for the property where improvement will be made:
 - a. A printed **copy of the most recent Collin County Appraisal District's appraised market value of the property** (<http://www.collincad.org/propertysearch>);
 - b. **Proof that the homeowner is current on property taxes for the property** (<http://taxpublic.collincountytx.gov/webcollincounty/accountsearch.htm>);
 - c. **Proof that the homeowner is current on the insurance** for the property as evidenced by a receipt or documentation showing the policy has been paid or is current on scheduled payments;
 - d. **Bid estimate(s)** provided by a contractor who will perform the home improvements **OR** for jobs completed by the homeowner without the assistance of a contractor, and **material cost documentation** showing the costs of materials the homeowner will need to purchase to complete home improvements.

Applications can only be submitted at the mandatory one-on-one application meeting; no mail-in or electronic application submittals. Call (972) 208-8150 to schedule a one-on-one application meeting.

Failure to bring the above documentation may delay approval to participate in The Great Update Rebate program

GREAT UPDATE REBATE PROGRAM RESIDENTIAL AGREEMENT

Residential Agreement

I, _____ (print homeowner's full name), hereinafter referred to as the "Recipient," agree to participate in the City of Plano's The Great Update Rebate Program, hereinafter referred to as the "Program" and hereby agree to the following with respect to my participation in the Program.

A. Program Process

Recipient agrees and understands that the Program provides rebates to homeowners for qualified and pre-approved improvements made to existing homes. The process is as follows:

1. The Recipient must complete and sign an application and a residential agreement. The application and residential agreement form can be mailed to the homeowner upon request.
2. The Recipient will attend a face-to-face appointment with a Program Coordinator. The Coordinator will review the application and the program policy with the Recipient.
3. The Program Coordinator will schedule an initial inspection for the Project Estimator to inspect the area for which improvements will be made and verify submitted job estimate. If the Project Estimator has questions regarding the job estimate, the Recipient may be contacted to explain costs. The Project Estimator approves the job estimate.
4. The Program Coordinator will submit a Notice to Proceed Letter and approved Job Estimate Form to the Recipient. The letter will confirm the authorized improvements, rebate amount, and a project completion date. For improvements that require a permit, the Recipient must obtain all necessary permits and required inspections.
5. The Recipient must contact the Program Coordinator and/or Building Inspections (permitted improvements only) once improvements are complete and schedule a Final Inspection.
6. After passing Final Inspection, Recipient must submit a Rebate Request Form, W-9, and receipts.
7. Rebate Award Letter and rebate check are mailed to the Recipient within one month of receipt of all supporting documentation mentioned in Section A.6.

B. Rebate Requirements

The Recipient agrees to begin and complete home improvements within three (3) months of program approval; a deadline date to complete improvements is written in the Notice to Proceed letter. Only expenses associated with costs listed in the Notice to Proceed letter will be reviewed for rebate.

C. Conditions of Participation

Recipient agrees to adhere to the following provisions to qualify for the Program after meeting all eligibility requirements set forth in Exhibit A as listed on the City of Plano's website.

- 1. Provide all supporting documentation necessary to document improvements to be made to the home and estimated costs to make improvements.**
 - a. Recipient will provide the City an estimated cost to make the home improvements(s).
 - b. Recipient will attend a mandatory one-on-one meeting with city staff and provide support documentation in the form of contractor bid(s), landscape plans, or material costs for "Do It Yourself" (DIY) work performed and include the City approved, associated labor costs.
 - c. Recipient will not start improvements (including down payments, deposits, or purchase items) until receiving a Notice to Proceed Letter, and obtaining all necessary permits, if any.
 - d. Recipient must indicate on their application if they will be doing the improvements themselves or enlisting a contractor to do all or a portion of the work.

- 2. Schedule Initial and Final Inspections.**
 - a. Recipient must be available or have an adult, at minimum 18 years of age, available for City staff to perform inspections.
 - b. Recipient is responsible for ensuring improvements are completed in a workman-like manner.
 - c. Recipient must utilize a contractor registered with the City of Plano to perform all improvements requiring a permit.
 - d. The City does not warrant any of the products or services installed.
 - e. The City of Plano shall have no liability for the work. Recipient agrees to hold harmless, indemnify, and release the City against any claims, fines, damages, penalties, lawsuits or judgments arising out of The Great Update Rebate program.



3. Submit required paperwork within fourteen (14) business days of completing home improvements

- a. Recipient must submit a Rebate Request Form and receipt(s) for work performed after passing of the Final Inspection.
- b. Recipient is responsible for ensuring paperwork is complete and submitting additional paperwork, if requested by the Program Coordinator to confirm final job cost(s).
- c. Recipient agrees to allow the City to utilize photographs taken during inspections (de-identified by address) for promotional materials for The Great Update Rebate Program.
- d. The program is subject to available funding, and the City reserves the right to terminate the program for any reason on thirty (30) day notice to Recipient. The program is also subject to the cooperation of the Recipient. Failure of the Recipient to adhere to the conditions of this agreement will result in immediate suspension of the Recipient from the Program and termination of the agreement.
- e. Recipient is solely responsible and liable to the contractor for all costs of improvements.

D. Disclosure of Rebate to Internal Revenue Service

Rebates provided will be reported to the Internal Revenue Service (IRS). Recipients will be mailed a paper copy of Form 1099 by January 31st of the following year.

E. Amendments

This Program agreement or associated timelines are subject to change by the City of Plano without notice.

F. Disclaimer and Indemnification

THE CITY IS NOT A PARTY TO THE CONTRACT BETWEEN RECIPIENT AND CONTRACTOR. THE CITY AND ITS REPRESENTATIVES ARE SOLELY PROGRAM ADMINISTRATORS AND AS SUCH ARE REQUIRED TO PROVIDE INFORMATION AND MONITOR COMPLIANCE WITH CITY POLICIES AND REGULATIONS IN THE ADMINISTRATION OF THE PROGRAM. ANY INFORMATION PROVIDED BY THE CITY TO RECIPIENT DOES NOT CONSTITUTE LEGAL ADVICE TO RECIPIENT AND IS FOR INFORMATIONAL PURPOSES ONLY. ANY DISPUTES, DISAGREEMENTS, FINES, CLAIMS, OR LAWSUITS ARISING OUT OF THE PROJECT BETWEEN OWNER AND CONTRACTOR ARE THE SOLE RESPONSIBILITY OF THE OWNER, AND OWNER EXPRESSLY AGREES TO INDEMNIFY, RELEASE, AND HOLD HARMLESS CITY FROM SAME.

RECIPIENT AGREES THAT IT IS HIS/HER RESPONSIBILITY TO SEE THAT THE WORK IS COMPLETED AS SPECIFIED, AND THAT CITY HAS NO RESPONSIBILITY FOR ANY FAULTY OR INCOMPLETE WORK OF THE CONTRACTOR. RECIPIENT ALSO AGREES



THAT HIDDEN OR LATENT CONDITIONS ARE NOT THE RESPONSIBILITY OF THE CITY, NOR IS CITY LIABLE FOR SUCH CONDITIONS. RECIPIENT AGREES TO HOLD HARMLESS, INDEMNIFY, AND RELEASE THE CITY AGAINST ANY CLAIMS, FINES, DAMAGES, PENALTIES, LAWSUITS OR JUDGMENTS ARISING OUT OF THE GREAT UPDATE REBATE PROGRAM AND/OR CONTRACTOR'S RECOMMENDATIONS OR WORK.

By signing below, I acknowledge that I have fully read this agreement and understand and agree to the terms contained herein.

DATED this _____ day of _____ 20__.

Recipient

Recipient's Address

Recipient's Phone Number

Recipient's E-mail Address

EXHIBIT A

THE GREAT UPDATE REBATE PROGRAM ELIGIBILITY

Eligible Properties

- Single family houses, duplexes, townhouses and condominiums qualify
- House is 35 years or older
- Any occupancy and ownership qualifies (Owner-occupied, tenant-occupied, or vacant)
- Current on taxes and insurance
- The County Appraisal District (CAD) appraised market value of the property must be less than or equal to 70% of the FHA single-family mortgage limit for Collin County for the current year. Please contact staff for current maximum values.

Eligible Improvements

- Both interior and exterior improvements qualify, with exceptions noted below under “INELIGIBLE”.
- Expenditures on the property update must total 10% or more of the CAD appraisal market value of the property. For example, a \$150,000 property must invest \$15,000 into the property to qualify.
- Qualified updates may start only after receiving a Notice to Proceed from City (this includes down payments, deposits or purchased items).
- Complete within three months of start, although extensions are allowed with demonstrated need.
- Must result in a livable unit.
- Repairs to individual condominium units not covered by the property owner association.
- Landscaping is eligible only per plan approved by the City’s Landscape Architect.

INELIGIBLE Improvements

- New pools, hot tubs, spas and water features
- Any landscaping plan that includes the following:
 - Plants that are not native or naturalized (prefer [Texas Smartscape](#) plants).
 - Irrigation system that does not allow plants to become established under current water restrictions at the time of plan approval (may require drip irrigation or soaker hoses).
- Repair or replacement of sprinkler systems lacking digital controllers with functional rain and temperature sensors.
- Detached accessory structures
- Garage enclosures
- Carports
- Exterior improvements or other items covered by the HOA for condominium units
- Any project started before receiving your Notice to Proceed is ineligible for the rebate (this includes deposit, down payments and purchased items).

Rebate

- \$5,000 limit per property per 12 months (From the date of the Notice to Proceed letter)
- 25% rebate on exterior improvements
- 10% rebate on interior improvements
- All improvements must be completed once agreement is signed, or the project is wholly disqualified. (No partial rebates.)



The Great Update Rebate Application



Neighborhood Services Department
 7501-A Independence Pkwy.
 Plano, TX 75025

For More Information
 Call: 972.208.8150
 Email: greatupdaterebate@plano.gov

OWNER INFORMATION			
Owner Name(s):		Phone:	
Owner Address:			
Owner City:		Owner State:	Owner ZIP Code:
TX DL/Government ID:		Email:	
How long have you owned the property?			Veteran? Yes No
PROPERTY INFORMATION			
Property Address (if same as Owner write SAME):			
Property City:		Zip Code:	
CAD Value:		http://www.collincad.org/propertysearch - Attach Proof	
Current on Taxes: Yes or No Attach Proof - http://taxpublic.collincountytx.gov/webcollincounty/accountsearch.htm			
Current on Insurance: Yes or No Attach Proof			
Occupancy: Owner-Occupied Rent/Lease-Occupied Vacant (Check Only One)			
Is this project the result of an accessibility issue (ie. grab bars, ramp, widen door):			Yes or No
IMPROVEMENT(S) REQUEST			
Exterior Improvement(s) Section		Estimated Cost: Attach Proof	
Describe Exterior Improvement(s):			
Interior Improvement(s) Section		Estimated Cost: Attach Proof	
Describe Improvement(s):			
I certify that the information provided on this form is accurate, to the best of my knowledge, and understand the information stated on the Disclosure of Information on Lead-Based Paint and/or Lead-Based Paint Hazards.			
Signature of Owner:			Date
Signature of Co-Owner:			Date

Disclosure of Information on Lead-Based Paint and/or Lead-Based Paint Hazards

Lead Warning Statement

Every owner of any interest in residential real property on which a residential dwelling was built prior to 1978 is notified that such property may present exposure to lead from lead-based paint that may place young children at risk of developing lead poisoning. Lead poisoning in young children may produce permanent neurological damage, including learning disabilities, reduced intelligence quotient, behavioral problems, and impaired memory. Lead poisoning also poses a particular risk to pregnant women. A risk assessment or inspection for possible lead-based paint hazards may be required prior to disturbing painted surfaces on pre-1978 housing as per 24 CFR Part 35.

Owners are encouraged to visit the EPA's website to learn more about EPA's Lead Renovation, Repair and Painting Rule (RRP Rule) that requires that firms performing renovation, repair, and painting projects that disturb lead-based paint in homes, child care facilities and pre-schools built before 1978 have their firm certified by EPA (or an EPA authorized state), use certified renovators who are trained by EPA-approved training providers and follow lead-safe work practices.

Additional information including how the rule applies to Do-It-Yourselfers visit:
<http://www2.epa.gov/lead/renovation-repair-and-painting-program>

The Great Update Rebate

*In participating in **The Great Update Rebate** program, City of Plano staff's sole purpose for making inspections (with the exception of Building Inspections) is to verify program requirements. While city staff may have knowledge and/or training in the area of Lead Based Paint and Lead Based Paint Hazards (LBP\LBPH), it is the Owners responsibility to retain qualified professionals to assist and direct the owner in regards to LBP\LBPH. Approval of program participation and/or funding of rebates are not to be construed in any way shape or form as the City of Plano's approval for repair methodology or contractor selection.*

Certification of Accuracy

The following parties have reviewed and understand the information above.

Owner Date Co-Owner Date

Owner Acknowledgment (initial) *To be initialed at the application meeting upon receiving the pamphlet

_____ Owner has received the pamphlet *Protect Your Family from Lead in Your Home.*

Submit one of the two forms with your application:

1) **Job Estimate Contractor Form:** To be completed for improvements being performed by a paid contractor; and minor homeowner purchases/labor; or

2) **Job Estimate Do-It-Yourself (DIY) Form:** to be completed for all improvements performed by the homeowner (remember to utilize the approved Labor Rates Form).



THE GREAT UPDATE
REBATE PROGRAM



EFFECTIVE LABOR RATES FOR OWNER COMPLETED PROJECTS**

Carpenter - Finish, Trim / Cabinet- Per Hour (HR)	\$ 36.41
Carpenter - General Frammer - per HR	\$ 41.24
Cleaning - per HR	\$ 28.10
Concrete Finisher - per HR	\$ 37.47
Demolition Laborer - per HR	\$ 21.47
Drywall Installer / Finisher - per HR	\$ 39.00
Electrician - per HR	\$ 57.78
Fencing Installer - per HR	\$ 35.87
Flooring Installer - per HR	\$ 26.76
Wood Flooring Installer - per HR	\$ 36.54
Hardware Installer - per HR	\$ 29.07
Heating / A.C. Mechanic - per HR	\$ 56.58
Insulation Installer -per HR	\$ 28.26
General Laborer - per HR	\$ 18.75
Mason - Brick / Stone - per HR	\$ 26.40
Plasterer - per HR	\$ 35.50
Plumber - per HR	\$ 62.25
Painter - per HR	\$ 32.79
Roofer - per HR	\$ 52.00
Siding Installer - per HR	\$ 42.78
Stucco Installer - per HR	\$ 24.74
Tile / Cultured Marble Installer - per HR	\$ 31.60
Wallpaper Hanger - per HR	\$ 34.03

**The rates listed above are not necessarily applicable to professional tradesmen. Rather these are approved City of Plano per hour labor rates for The Great Update Rebate program's Do-It-Yourself (DIY) improvements ONLY.