

The Great Update Rebate Application Checklist



The following items must be submitted to a Housing and Community Services Coordinator to be eligible.:

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**. Note: Appraised and tax assessed values are not the same. (<http://www.collincad.org/propertysearch>);
- ☐ b. **Proof that the homeowner is current on property taxes for the property** (<https://taxpublic.collincountytx.gov/search>);
- ☐ c. From the homeowners' insurance company, **proof that the homeowners' insurance premium is current to date**. The information will include property address, policy number, policy period;
- ☐ 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.
- ☐ e. **Government Issued Photo ID** of the property owners. Ensure to include front and back copy.

Call (972) 208-8150 for more information.

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

GREAT UPDATE REBATE PROGRAM 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 submit an application to a Program Coordinator by email, regular mail or drop it off at the Neighborhood Services building, 777 15th Street, Plano, Texas 75074. The Coordinator will review the application and the program policy with the Recipient, by scheduled appointment.
3. Once the information in the application has been reviewed for completion and correctness, 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

Recipient agrees to begin and complete home improvements within four (4) 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.

1. Maximum rebate is \$5,000
2. Improvement investment must be \$20,000 or more

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 and Exhibit B, 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. Recipients will be contacted by the Program Coordinator if the application package is incomplete or unclear. Recipients must make the required revisions noted by the Program Coordinator before an inspection is scheduled. The inspection ensures that the requested repairs are eligible, and the recipient has not commenced the project.
- c. Recipient will not start improvements (including down payments, deposits, or purchased items) until receiving a Notice-to-Proceed Letter and obtaining all permits, if required.
- 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's Building Inspection Department 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, W-9 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 Name (printed)

Recipient Name (signature)

Recipient's Complete 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 30 years or older.
- Only owner-occupied properties are eligible. No rental property.
- Current on taxes and insurance.
- The County Appraisal District (CAD) appraised market value of the property must be less than or equal to 85% of the FHA single-family mortgage limit for Collin County for the current year. Please contact staff for current maximum values.

Eligible Improvements

- Exterior improvements qualify, with exceptions noted below under “INELIGIBLE.”
- Interior improvements found in the City’s “List of Approved Mobility Interior Improvements” that permit accessibility and mobility within the unit.
- Minimum property improvements must be \$20,000.
- Qualified updates may start only after receiving a Notice-to-Proceed from City (this includes down payments, deposits or purchased items).
- Complete within four months of start, although extensions are allowed with demonstrated need. Must call Project Coordinator to discuss demonstrated need.
- Must result in a livable unit. A livable unit is a residential property that is suitable and safe for occupancy with spaces for living, sleeping, eating and cooking. This includes, but is not limited to having completed kitchens, bathrooms, walls, flooring, smoke alarm, installed and working appliances.
- Repairs to individual condominium units that are not covered by the property owner association.
- Landscaping is eligible only per plan approved by the City’s Landscape Architect.

INELIGIBLE Improvements

- Any project started before receiving your Notice-to-Proceed letter is ineligible for the rebate (project start includes deposit, down payments and purchased items).
- 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.

Rebate

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

**EXHIBIT B
ATTESTATION
THE GREAT UPDATE REBATE
LIST OF APPROVED INTERIOR MOBILITY IMPROVEMENTS**



I, _____, owner of _____
(property address) attest that **I WILL** or **I WILL NOT** (must check one of the bolded phases) be making interior improvements as part of the Great Update Rebate program, and that the interior improvements that I will be completing, as indicated by a check mark by each item below, are to improve mobility in the interior of the property.

Interior

- ☐ Redesigning interior layout to an open concept design.
- ☐ Creating leveled transitions within the rooms of the home.
- ☐ Installing smooth durable hard flooring, low-pile industrial grade carpet, slip resistant surfaces that are non-glare.
- ☐ Widening doorways and hallways.
- ☐ Changing doorknobs to door handles
- ☐ Pull-down closet rods.
- ☐ Installing bi-folds or sliding closet doors.
- ☐ Installing protective padding and corner guards for walls.

Bathroom

- ☐ Installing grab bars and handrails.
- ☐ Installing Tilting mirrors.
- ☐ Installing ADA toilets.
- ☐ Installing walk-in showers, ADA transfer showers, ADA roll-in showers, ADA tub showers.
- ☐ Installing wall-mounted shower seats.
- ☐ Installing shower head with slide bar and handheld hose.

Kitchen

- ☐ Redesigning kitchen layout to maximize accessibility.
- ☐ Adjusting kitchen counters tops and cabinet heights.
- ☐ Adding roll-out trays, Lazy Susan, and pull-down shelving.
- ☐ Installing stove with controls in the front.
- ☐ Relocating garbage disposal switch to be reachable.

Print Owner Name

Date

Owner Signature

Date

Print Owner Name

Date

Owner Signature

Date



The Great Update Rebate Application



Neighborhood Services Department
777 15th Street
Plano, TX 75074

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

OWNER INFORMATION		
Owner Name(s):	Cell:	Alt. Phone:
Owner Address:		
Owner City:	Owner State:	Owner ZIP Code:
TX DL/Government ID:	Email:	
How long have you owned the property?		Veteran? <input type="checkbox"/> Yes <input type="checkbox"/> No
PROPERTY INFORMATION		
Property Address Must be Owner-Occupied.		
Property City:	Zip Code:	
CAD Value: http://www.collincad.org/propertysearch - Attach Proof		
Current on Taxes: <input type="checkbox"/> Yes or <input type="checkbox"/> No Attach Proof - http://taxpublic.collincountytx.gov/webcollincounty/accountsearch.htm		
Current on Insurance: <input type="checkbox"/> Yes or <input type="checkbox"/> No Attach Proof		

Is this project the result of an accessibility issue (i.e., grab bars, ramp, widen door): <input type="checkbox"/> Yes or <input type="checkbox"/> No	
IMPROVEMENT(S) REQUEST	
Exterior Improvement(s) Section	Project Cost: Attach Proof. <u>Do not round out numbers.</u>
Briefly Describe Exterior Improvement(s):	
Mobility Improvement(s) Section	Project Cost: Attach Proof. <u>Do not round out numbers.</u>
Briefly Describe Mobility 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

City Staff Area Only:

Received By: _____ 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\LBPB), it is the Owners responsibility to retain qualified professionals to assist and direct the owner in regards to LBP\LBPB. 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 _____
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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).



HOMEOWNER REPAIRS - CONTRACTOR

JOB ESTIMATE

OWNER NAME: _____

PROPERTY INFORMATION

ADDRESS: _____

CITY: _____

ZIP CODE: _____

CONTRACTOR NAME: _____

BID AMOUNT

BIDS SUBTOTAL

-

ADDITIONAL MATERIALS (OWNER PURCHASED)

ADDITIONAL MATERIALS SUBTOTAL

ADDITIONAL LABOR (OWNER SUPPLIED)

HOURS

RATE

ADDITIONAL LABOR SUBTOTAL

☐

CHECK BOX IF ATTACHING ADDITIONAL ITEMS

TOTAL ESTIMATED JOB COST

Owner Signature

Date

Complete by Project Estimator: _____ Approved as submitted OR Approved as edited (see above)



OWNER NAME: _____

JOB DESCRIPTION	
1	1. Job Title: Senior Software Engineer
2	2. Department: Engineering
3	3. Reporting Manager: Lead Engineer
4	4. Job Summary: Develop and maintain software applications, collaborate with cross-functional teams, and mentor junior engineers.
5	5. Key Responsibilities: Design, develop, and test software features; troubleshoot and resolve production issues; participate in code reviews; and contribute to technical documentation.
6	6. Qualifications: Bachelor's degree in Computer Science or related field; 5+ years of experience in software development; proficiency in Java, Python, and JavaScript; and strong problem-solving skills.
7	7. Compensation: Competitive salary and benefits package.
8	8. Contact Information: HR Department, 123 Main Street, Suite 456, City, State, Zip.
9	9. Application Deadline: October 15, 2023.
10	10. Equal Opportunity Statement: We are an equal opportunity employer and value diversity in our workforce.

[illegible]

MATERIALS CONTINUED:		ITEMIZED ESTIMATE: TIME AND MATERIALS		AMOUNT
MATERIALS SUBTOTAL				
LABOR:		<u>HOURS</u>	<u>RATE</u>	
LABOR SUBTOTAL				

☐ CHECK BOX IF ATTACHING ADDITIONAL DOCUMENTATION

TOTAL ESTIMATED JOB COST _____

HOMEOWNER SIGNATURE

DATE

Complete by Project Estimator: _____ Approved as submitted OR Approved as edited (see above)

Owner Initials:_____

**EFFECTIVE LABOR RATES** FOR OWNER COMPLETED PROJECTS**

Bricklayer / Mason / Stone	\$34.85
Carpenter	\$34.95
Concrete Finisher	\$34.65
Drywall Installer / Finisher	\$34.95
Electrician	\$40.20
Fence Installer	\$26.60
Flooring/Wall Installer / Tile	\$33.45
Flooring Installer / Wood	\$34.55
Hardware Installer	\$34.95
HVAC Mechanic	\$41.10
HVAC Duct Installer	\$38.30
Laborer	\$26.60
Painter/Wallcovering	\$29.20
Plaster / Stucco	\$33.95
Plaster / Stucco Lather	\$34.50
Plumber	\$39.55
Roofer	\$29.75
Siding Installer	\$34.95

**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.



**THE GREAT UPDATE REBATE PROGRAM
NOTICE-TO-PROCEED ACKNOWLEDGEMENT**



A project will not be eligible for The Great Update Rebate if any deposits or down payments are paid and/or any work has started or been completed prior to an approved application, completion of a compliance review, and issuance of a Notice-to-Proceed **Letter**. A verbal okay is not the same.

I understand that the project will not be eligible for The Great Update Rebate Program if any deposit or payment has been made, or if any work has begun or has been completed prior to receiving the Notice to Proceed **Letter**. A verbal okay is not the same.

Printed name

Date

Signature of homeowner

Printed name

Date

Signature of homeowner



THE GREAT UPDATE REBATE PERMIT AND INSPECTION REQUIREMENTS



Permits and Inspections

Permits may be required for some or all of the work completed on your property for The Great Update Rebate program.

You, and/or your contractor are responsible for obtaining all required permits at the start of the project, and for scheduling the final inspection through the City of Plano's Building Inspections (BI) department. The final BI inspection ensures that all work requiring permits meets the City of Plano's Building Codes.

Check this link to identify work requiring BI permitting: www.buildinginspections.org.

The Great Update Rebate Inspections

The Great Update Rebate (GUR) project coordinator only conducts compliance reviews/inspections for the sole purpose of verifying compliance with GUR program requirements. These reviews/inspections are apart from the Building Inspections department's inspections. The GUR project coordinator conducts inspections before the start of the project, and after your project is complete.

The GUR initial inspection is to ensure your work has not started, and the requested work for the rebate meets GUR program requirements. The final GUR inspection is to ensure that the work for which you requested a rebate is complete per program requirements.

The GUR project coordinator conducts final inspections only after all BI final inspections have passed.

Receiving Your Rebate

Rebates are only processed for work that has passed **both** the City of Plano's Building Inspections department final permit inspection, and The Great Update Rebate's final compliance review/inspection. Additionally, you must complete a Rebate Request Packet, and submit it with all the required documents, photographs, and receipts indicating that all the work for the project has been paid.

ATTESTATION

I (We) acknowledge receipt of the permit and inspection requirements of the Great Update Rebate Program, and understand that I forfeit my opportunity for a rebate for non-compliance with all permit and inspection requirements.

Owner (print)

Date

Owner (signature)

Co-Owner (print)

Date

Co-Owner (signature)



The Great Update Rebate
Proposed Landscape Improvements



Applicant: _____ Date: _____

Address: _____ Phone: _____

This form must be included as part of the application package for homeowners interested in including landscaping improvements as part of their Great Update Rebate scope of work.

Type of approved landscaping. Please check all that apply:

- ☐ Plants ☐ Trees/shrubs ☐ Boulders/Rocks ☐ Turf
☐ Sprinklers/Controls

1. Plants must be listed in the Texas SmartScape Program.
<https://www.conservenorthtexas.org/item/texas-smartscape-program>
1. Plants planted together must be water and sun/shade compatible when placed together.
2. New or repair to existing irrigation systems must have digital, rain and temperature sensors.
3. An arial drawing must be included with submission. The drawing shall indicate the:
 4. existing and proposed location of plants, shrubs, and hardscape around the perimeter of the home and in the yard
 5. the directional location of the home relative to North, South, East and West
 6. Estimates of proposed landscape plans must include:
 7. Number of plants, trees, boulders, and rocks
 8. Unit price
 9. Unit size or weight
 10. Total cost