

AGENDA ITEM

SUBJECT: 1002 West Lamar Street

NAME OF OWNER: Goebel, Robert John & Elizabeth

NAME OF INTERESTED PARTIES:

OWNER'S ADDRESS: 1002 West Lamar Street
McKinney, TX 75069-3728

LEGAL DESCRIPTION OF THE PROPERTY:

F M Hill Addition #2
Tax # R-0897-000-0010-1

GENERAL DESCRIPTION OF STRUCTURE: 1 story, wood frame

ZONING DISTRICT: "RS-60"

DATE STRUCTURE WAS PRESENTED A LETTER OF ELIGIBILITY FOR WORK WHICH QUALIFIES FOR HISTORIC TAX EXEMPTION July 28, 2016

SUPPORTING DOCUMENTATION:

Staff Report
Letter of Eligibility
Receipt(s) for Work Completed

STAFF RECOMMENDATION:

Staff is recommending final approval of the 50% tax exemption for 1002 West Lamar Street under Level 2 of the Historic Neighborhood Improvement Zone Tax Exemption Program.

COMMENTS:

STAFF REPORT

DATE: January 27, 2017

FROM: Guy R. Giersch, Historic Preservation Officer

THROUGH: Samantha Pickett, Planning Manager

SUBJECT: Request by Robert and Elizabeth Goebel for Final Approval of a Level 2 Historic Neighborhood Improvement Zone Tax Exemption for Rehabilitation Work to the House Located at 1002 West Lamar Street.

STAFF RECOMMENDATION: Staff is recommending final approval of a Level 2 (50%) tax exemption for North College Street under the Historic Neighborhood Improvement Zone Tax Exemption Program.

ITEM SUMMARY: On July 28, 2016, Staff issued a Letter of Eligibility determining that the proposed improvements at 1002 West Lamar Street would qualify for a Level 2 or Level 3 tax exemption.

On January 27, 2017, the applicant submitted paid receipts for the following:

• Siding Repair, Replace, Paint (exterior)	\$8,200.00
• Paint (Exterior)	\$935.06
• Insulate (exterior)	<u>\$7,469.25</u>
	total \$16,604.31

The applicant has submitted the necessary documentation to qualify for a Level 2 (50%) tax exemption since the total money spent on verified exterior improvements exceeds \$10,000 and was completed within the allotted time period. The Historic Preservation Officer has confirmed the documentation and the work.

BACKGROUND: On February 6, 2007, the City Council passed Ordinance #2007-02-014, as amended by Ordinance #2013-11-110 and #2015-12-105. The goal of the ordinance is to encourage preservation of McKinney's historic residential core by providing tax exemptions to owners of homes within a defined geographic area called the Historic Neighborhood Improvement Zone.

The ordinance establishes three levels under which owners of residential properties located in the Historic Neighborhood Improvement Zone may receive tax exemptions based on verified investments meeting specified criteria.

Under Level 1, homes which receive the designation of the Historic Marker may receive a 100% exemption of the City's ad valorem taxes for a period of 7 years.

Level 1 (and its accompanying Historic Marker Program) is administered by the Historic Preservation Officer and the Historic Preservation Advisory Board.

Under Level 2, owners who make verified exterior improvements costing at least \$10,000 during any 12-month period may receive a 50% exemption of the City's ad valorem taxes for a period of 15 years.

Under Level 3, owners who make verified exterior and/or interior improvements costing at least \$5,000 during any 12-month period may receive a 30% exemption of the City's ad valorem taxes for a period of 15 years. If an owner submits plans for additional improvements under Level 2 or Level 3 during any period of exemption previously granted under Level 3, such owner, upon approval of the Building and Standards Commission, may receive an exemption of 50% of the ad valorem taxes for a period of 15 years from the date of such approval.

The application process for Level 2 and Level 3 requires owners to submit plans for proposed improvements to residential properties to the Historic Preservation Officer (and to the Building Permits Department, if a building permit is required). Owners then receive a Letter of Eligibility if the Historic Preservation Officer determines that the proposed improvements qualify for the tax exemption program. Upon completion of the improvements, owners are required to submit documentation to the Historic Preservation Officer acknowledging that the improvements have been made in accordance with the plans and verifying that the eligible costs have been incurred. After receiving the final documentation from the applicant, the HPO completes a field investigation of the property to confirm the documentation.

The Ordinance states that: Owners may submit additional applications under Level 2 during any period of exemption. If such applications are approved, the exemption period shall be extended from the date of the last approval. In such event, the exemption periods run concurrently until the earliest approval expires and continues until the latter approval expires.

For the verification process to be completed under Level 2 or Level 3, tax exemptions require final determination by the Building and Standards Commission.

ATTACHMENTS:

- Letter of eligibility
- Copies of paid receipts

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July 28, 2016

Robert and Elizabeth Goebel
1002 West Lamar Street
McKinney, Texas 75069

RE: 2016-010HT Letter of Eligibility to Qualify the Residential Property Located at 1002 West Lamar Street for a Level 2 or Level 3 Historic Neighborhood Improvement Zone (HNIZ) Tax Exemption.

Dear Mr. & Ms. Goebel:

This letter shall serve as your Letter of Eligibility for the Historic Neighborhood Improvement Zone (HNIZ) Tax Exemption Program. Your application for 1002 West Lamar Street was received on July 28, 2016.

The following proposed improvement(s) are eligible:

- Foundation Repair - Exterior
- Repair and Paint Exterior or House - Exterior

Upon completion of the improvements, dated, paid, final receipts from the contractor must be submitted to this office for verification. Once copies of receipts are verified and the project is inspected, a Staff Report will be forwarded to the next meeting of the Building and Standards Commission for approval or denial of the tax exemption.

From the date of issuance of this Letter of Eligibility, you have 1 year to complete any or all of the proposed improvements listed above. Depending on the combination of verifiable costs of these exterior and interior improvements, you may qualify for a Level 2 or Level 3 exemption. If the combined cost of eligible *exterior* improvements is in excess of \$10,000, you may receive an exemption of 50% of the City's ad valorem taxes for a period of 15 years (Level 2 of the Historic Neighborhood Improvement Zone Program). If the combined cost of eligible *interior or exterior* improvements is in excess of \$5,000, you may receive

an exemption of 30% of the City's ad valorem taxes for a period of 15 years (Level 3 of the Historic Neighborhood Improvement Zone (HNIZ) Tax Exemption Program).

Please be advised that there is an aggregate cap of \$100,000 on the total amount of ad valorem taxes that can be exempted in any budget year under any or all of the levels set forth in the HNIZ Tax Exemption Program. Therefore, it is possible that the completion of eligible improvements may not result in a historic tax exemption should capacity not be available in the program. At this time, capacity is still available in the program.

If you have any questions, please contact me at 972-547-7416.

Sincerely,

Guy R. Giersch, Historic Preservation Officer

Guy R. Giersch

Historic Preservation Officer

"The Planning Department consistently strives to provide quality, professional customer service to our applicants. In an effort to evaluate and improve the service we provide, we ask that you complete this brief customer service survey. We sincerely appreciate your responses and opinions!" <https://www.surveymonkey.com/r/McKinneyPlanningFeedback>

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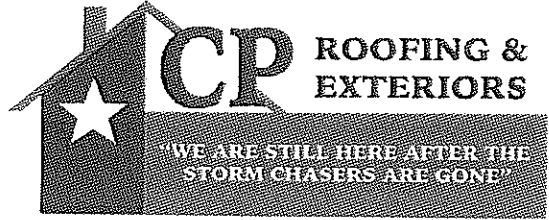
Guy R. Giersch, Historic Preservation Officer

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CP Roofing & Exteriors, LLC
 535 La Esperanza Road
 Nevada, TX 75173 US
 (214)609-3969
 chris@cproofingexteriors.com



INVOICE

BILL TO
 1002 W Lamar
 McKinney TX 75069

INVOICE # 1005
DATE 10/13/2016

ACTIVITY

Spray in insulation
 Spray in insulation (crawl space)

Amount Paid

QTY	RATE	AMOUNT
1	0.00	0.00

Thank you for choosing us!

PAID
 BALANCE DUE
 3700.00
 + 2000

~~\$0.00~~
 \$6900
 TAX 569.25
 7469.25

~~3769.25~~
 DUE
 \$1769.25
 STILL DUE

PROPOSAL NO. _____
 SHEET NO. _____
 DATE 2/14/12

PROPOSAL SUBMITTED TO:

WORK TO BE PERFORMED AT:

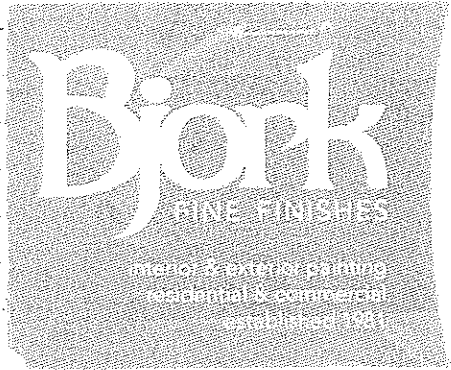
NAME: Bob & Beth Archer
 ADDRESS: _____
 PHONE NO: _____

ADDRESS: 1702 Island
 TYPE OF PENS: _____
 PROJECT: _____

We hereby propose to furnish the materials and perform the labor necessary for the completion of _____

Interior Paint Job

Estimate # 20054



Phone: Bjork
 512-926-3367
 www.bjorkpainting.com

All material is guaranteed to be as specified, and the above work to be performed in accordance with the drawings and specifications submitted for above work and completed in a substantial workmanlike manner for the sum of _____

Dollars (\$ _____) with payments to be made as follows:

Any alteration or deviation from above specifications by the contractor will be executed only upon written order, and will become an extra charge over and above the estimate. All agreements, conditions, specifications, or delays subject our control.

Respectfully submitted _____

Per _____
 Note — this proposal may be withdrawn by us if not accepted within _____ days.

ACCEPTANCE OF PROPOSAL

The above prices, specifications, and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payments will be made as outlined above.

Signature _____

Date _____ Signature _____



SHERWIN-WILLIAMS



SHERWIN-WILLIAMS

CUSTOMER ORDER

Page: 1 of 1

MCKINNEY 7751

310 N CENTRAL EXPRESSWAY
MCKINNEY TX 75070 3927
PH: (972) 542-2306
FX: (972) 542-0454
WWW.SHERWIN.COM

STORE: 7751 SHERWIN-WILLIAMS
310 N CENTRAL EXPRESSWAY
MCKINNEY TX 75070 3927
PHONE: (972) 542-2306
FAX: (972) 542-0454

TYPE: STORE
CUST PO#: 0277906
CONTROL#: 0277906
ORDER#: 0602779067751
ENTRY DATE: 10/17/16
REQUIRED DATE: 10/17/16
CANCEL DATE:
EMPLOYEE: KEMPER, MICHAEL R
STATUS: IN PROCESS
CONTACT:
PHONE:
DELIVERY: NO
INSTALL: NO
DEMONSTRATION: NO
CUST ORDER JOB:

DATE: 10/17/16
TIME: 10:22
MERCHANT: GOBBEL HUBERT
ADDRESS: 310 N CENTRAL EXPRESSWAY
MCKINNEY TX 75070

SALE: 4321.2
TAX: 14.22
TOTAL: 4335.42

5 DEPOSIT 935.00

SUBTOTAL BEFORE TAX 3399.00

8.25% SALES TAX: 279.53
TOTAL 3678.53

VISA

Amount Paid
935.00

QTY	EXTENDED	C-W	SALES
ORDERED	PRICE	FURCHAS	ORDER TERM/TRAN
15.00	71.99	1079.95	COMMITTED
		-	432.00
5.00	.00		CANCELLED
5.00	71.99	359.95	COMMITTED
		-	144.00

Discount (\$)
Reason: Sales Event

Color: SW7636 ORIGAMI WHITE

Color User 05 32 64 128
B1 Blk - 10 - -
R2 Maroon - 2 1 -
Y3 Deep Gold - 12 1 -
Sher-Color Formula

THIS IS NOT AN INVOICE

*** CONTINUED ON PAGE 2 ***

