

Heritage Tax Exemption Program

In 1984, the City Council initiated a tax exemption program to provide an incentive for owners of historic structures to preserve and maintain their properties.

The amount of the exemption is a percent of the property taxes on the structures and improvements (not the value of the land). The percent of exemption is grouped into four categories based on whether the property is individually designated as a heritage landmark or a contributing resource in a heritage district; and whether or not the property is used exclusively for residential purposes.

Class	Property Category	Exemption Rate
A	Heritage Landmark - Residential Use	100%
B	Heritage Landmark - Non-Residential Use	50%
C	Contributing or Compatible Structure - Residential Use	75%
D	Contributing or Compatible Structure - Non-Residential Use	38%

Eligibility Requirements

In accordance with the Heritage Tax Exemption ordinance, to qualify for a heritage tax exemption this year, a property must have complied with the following eligibility requirements by January 1, 2021:

1. The structure is being preserved and maintained in accordance with minimum property, structural, health, and safety standards as adopted by the City of Plano;
2. The structure and site are in compliance with the City's Zoning Ordinance and Heritage Preservation Ordinance;
3. There are no delinquent property taxes owed to the City of Plano;
4. No permits or applications for demolition or relocation of the structure have been submitted, suspended, approved, issued, or are in any other stage that may allow demolition or relocation of the structure during the current year;
5. No exterior work was completed, installed, or is under construction without a Certificate of Appropriateness (CA) or in deviation of a previously approved CA; and
6. All repairs required from a previous tax exemption inspection have been completed by the established deadline, if applicable.

Heritage Tax Exemption Process

1. In January of each year, an inspection is performed on the exterior of each property enrolled in the tax exemption program.
2. In April, a letter is sent via certified mail to each owner to inform them of the status of their exemption. The letter provides a detailed report and lets them know the deficiencies must be corrected before December 31st in order for their property to remain eligible for tax exemption.
3. In October, a letter is sent via certified mail to each property owner to remind them of the deadline to correct deficient elements. This letter also provides the process to request and receive an extension of the deadline.
4. In December, a postcard notice is mailed to each property owner reminding them to correct the deficient elements by the end of the year to maintain eligible for tax exemption.
5. After the first of the year, Planning Department staff inspects each property and reviews the previously identified deficiencies and looks for any new deficiencies.
6. If deficiencies from the previous year have not been corrected, the property owner is provided a notice of determination of ineligibility sent by certified mail and by email. The information provided with the notice includes a copy of the Heritage Tax Exemption inspection report, an explanation for ineligibility, and the procedure/deadline to submit an appeal regarding the determination. The notice includes the process/deadline to submit an appeal.
7. In February, City Council holds a public hearing and considers the approval of Heritage Tax Exemptions.
8. Upon approval of the Heritage Tax Exemptions by the City Council, Planning staff then delivers the tax exemption information to the Collin Central Appraisal District so they can update their records for the tax bills that will be due the following year.

Attachment A - Properties Eligible for 2021 Heritage Tax Exemption

	Property Location	Heritage Landmark/Heritage District (HD)	Owner's Mailing Address per CCAD	Staff Recommendation	Tax Exemption Percentage	2020 Improvement Value	Plano City (CPL) 0.4482%	Collin College (JCN) 0.081222%	Plano ISD (SPL) 1.32375%	Estimated Exemption for 2021
1	1001 E. 15th Street	Plano National Bank/IOOF Lodge Downtown HD	The Schell Family Trust B Shirley Carter Schell Trustee 1525 Janwood Drive Plano, TX 75075	Approval	50%	\$785,879	\$1,761	\$319	\$5,202	\$7,282
2	1015 E. 15th Street	Bagwill-Sherrill Building Downtown HD	1015 Metropolitan Plano Ltd. 3838 Oak Lawn Avenue; Suite 1416 Dallas, TX 75219	Approval	50%	\$219,387	\$492	\$89	\$1,452	\$2,033
3	1023 E. 15th Street	Merritt Building Downtown HD	M. F. Robert and Mirna Lynch 4604 Lawson Court Plano, TX 75093	Approval	50%	\$305,419	\$684	\$124	\$2,021	\$2,830
4	1211 E. 15th Street	Hood House	Legacy Pavers LLC 1211 E.15th Street Plano, TX 75074-6207	Approval	50%	\$96,975	\$217	\$39	\$642	\$899
5	1407 E. 15th Street	Carlisle House	Michael and Harriet Linz 1407 E. 15th Street Plano, TX 75074	Approval	100%	\$437,038	\$1,959	\$355	\$5,785	\$8,099
6	1410 E. 15th Street	Arch Weatherford House	Josephine Howser 1410 E. 15th Street Plano, TX 75074	Approval	100%	\$258,747	\$1,160	\$210	\$3,425	\$4,795
7	1413 E. 15th Street	Roller House	James Baker and Deborah Sue 1413 E. 15th Street Plano, TX 75074	Approval	100%	\$498,737	\$2,235	\$405	\$6,602	\$9,242
8	1414 E.15th Street	Salmon House	Kenny and Toni Wilson 1414 E.15th Street Plano, TX 75074	Approval	100%	\$352,489	\$1,580	\$286	\$4,666	\$6,532
9	807 E. 16th Street	Wyatt House Haggard Park HD	Margarita Trejo 807 E. 16th Street Plano, TX 75074-5833	Approval	100%	\$192,454	\$863	\$156	\$2,548	\$3,567
10	1210 E. 16th Street	Schell House	Michael Hamilton 1210 E. 16th Street Plano, TX 75074	Approval	100%	\$178,637	\$801	\$145	\$2,365	\$3,310
11	1211 E. 16th Street	Carpenter House	Richard, Barbara & Elizabeth Pool 49 Crown Place Richardson, TX 75080-1603	Approval	100%	\$384,363	\$1,723	\$312	\$5,088	\$7,123

Attachment A (continued)

	Property Location	Heritage Landmark/Heritage District (HD)	Owner's Mailing Address per CCAD	Staff Recommendation	Tax Exemption Percentage	2020 Improvement Value	Plano City (CPL) 0.4482%	Collin College (JCN) 0.081222%	Plano ISD (SPL) 1.32375%	Estimated Exemption for 2021
12	900 17th Street	Will Schimelpfenig House Haggard Park HD	Jack and Cindy Boggs 1802 Weanne Drive Richardson, TX 75082	Approval	100%	\$223,394	\$1,001	\$181	\$2,957	\$4,140
13	901 17th Street	Mathews House Haggard Park HD	Michael Bratsch 3601 Potomac Ave Dallas Tx 75205	Approval	100%	\$237,527	\$1,065	\$193	\$3,144	\$4,402
14	906 18th Street	R.A. Davis House Haggard Park HD	Whitehead & Sheldon LLC 1213 Gardengrove Ct. Plano, TX 75075-7317	Approval	50%	\$342,070	\$767	\$139	\$2,264	\$3,170
15	909 18th Street	Hughston House Haggard Park HD	R3TE Ventures, LLC 1912 Glenwick Drive Plano, TX 75075	Approval	50%	\$398,766	\$894	\$162	\$2,639	\$3,695
16	914 18th Street	Mary Schimelpfenig House Haggard Park HD	Anthony and Debbie Holman 914 18th Street Plano, TX 75074	Approval	50%	\$72,065	\$161	\$29	\$477	\$668
17	1615 H Avenue	Aldridge House Haggard Park HD	Clinton M. Haggard 7352 Independence Parkway Frisco, TX 75035	Approval	100%	\$352,178	\$1,578	\$286	\$4,662	\$6,526
18	1709 H Avenue	Lamm House Haggard Park HD	John and Helen Proch 1709 H Avenue Plano, TX 75074	Approval	100%	\$183,513	\$823	\$149	\$2,429	\$3,401
19	1611 K Avenue	Little Carlisle House	Little Carlisle House LLC 1611 K Avenue Plano, TX 75074	Approval	50%	\$149,665	\$335	\$61	\$991	\$1,387
20	1617 K Avenue	Forman House	Gwendolyn Workman 1617 K Avenue Plano, TX 75074	Approval	50%	\$117,254	\$263	\$48	\$776	\$1,086
21	1704 N Place	McCall Skaggs House	William and Annette Armstrong 1704 N Place Plano, TX 75074	Approval	100%	\$219,904	\$986	\$179	\$2,911	\$4,075
22	3921 Coit Road	Wells Homestead	Wells Homeplace LLC c/o Richard Wells 5001 K Avenue Plano, TX 75074	Approval	50%	\$62,786	\$141	\$25	\$416	\$582

Attachment A (continued)

	Property Location	Heritage Landmark/Heritage District (HD)	Owner's Mailing Address per CCAD	Staff Recommendation	Tax Exemption Percentage	2020 Improvement Value	Plano City (CPL) 0.4482%	Collin College (JCN) 0.081222%	Plano ISD (SPL) 1.32375%	Estimated Exemption for 2021
23	1600 Carpenter Drive	Haggard Park HD	Wendi Carter 1600 Carpenter Drive Plano, TX 75074	Approval	75%	\$228,863	\$769	\$139	\$2,272	\$3,181
24	1601 Carpenter Drive	Haggard Park HD	Wykoff Kelly and Christopher Mark Dehertogh 1601 Carpenter Drive Plano, TX 75074	Approval	75%	\$228,863	\$769	\$139	\$2,272	\$3,181
25	1604 Carpenter Drive	Haggard Park HD	Greentree Properties, LLC 6239 Royal Lane Dallas, TX 75230	Approval	75%	\$249,311	\$838	\$152	\$2,475	\$3,465
26	1605 Carpenter Drive	Haggard Park HD	David & Mireya Cowen 1605 Carpenter Drive Plano, TX 75074	Approval	75%	\$249,311	\$838	\$152	\$2,475	\$3,465
27	1608 Carpenter Drive	Haggard Park HD	Shah Bindu S Revocable Trust 1608 Carpenter Drive Plano, TX 75074-8645	Approval	75%	\$249,311	\$838	\$152	\$2,475	\$3,465
28	1612 Carpenter Drive	Haggard Park HD	Charles William III & Katherine Kraft 3412 Starlight Trail Plano, TX 75023	Approval	75%	\$249,311	\$838	\$152	\$2,475	\$3,465
29	1613 Carpenter Drive	Haggard Park HD	Sallie Ann Plaxico 1613 Carpenter Drive Plano, TX 75074	Approval	75%	\$249,311	\$838	\$152	\$2,475	\$3,465
30	1616 Carpenter Drive	Haggard Park HD	John Weber and Marlen Jadally 1616 Carpenter Drive Plano, TX 75074	Approval	75%	\$249,311	\$838	\$152	\$2,475	\$3,465
31	1617 Carpenter Drive	Haggard Park HD	Jake Meyer & Stefani E Reed 1617 Carpenter Drive Plano, TX 75074	Approval	75%	\$249,311	\$838	\$152	\$2,475	\$3,465
32	1621 Carpenter Drive	Haggard Park HD	Brett and Mara Bim 1621 Carpenter Drive Plano, TX 75074	Approval	75%	\$249,311	\$838	\$152	\$2,475	\$3,465
33	1624 Carpenter Drive	Haggard Park HD	Mat's Flats, LLC-Series 1624 Carpenter Dr. P.O. Box 940354 Plano, TX 75094-0354	Approval	75%	\$207,302	\$697	\$126	\$2,058	\$2,881
34	1625 Carpenter Drive	Haggard Park HD	Walter and Susan Ragsdale Revocable Trust 607 Parker Drive Pottsboro, TX 75076-5343	Approval	75%	\$207,302	\$697	\$126	\$2,058	\$2,881

Attachment A (continued)

	Property Location	Heritage Landmark/Heritage District (HD)	Owner's Mailing Address per CCAD	Staff Recommendation	Tax Exemption Percentage	2020 Improvement Value	Plano City (CPL) 0.4482%	Collin College (JCN) 0.081222%	Plano ISD (SPL) 1.32375%	Estimated Exemption for 2021
35	617 E. 16th Street	Haggard Park HD	Peggy Ostrander 617 E. 16th Street Plano, TX 75074	Approval	38%	\$231,455	\$394	\$71	\$1,164	\$1,630
36	801 E. 16th Street	Haggard Park HD	Rudolph and Ramona Ringle 801 E. 16th Street Plano, TX 75074	Approval	75%	\$761,549	\$2,560	\$464	\$7,561	\$10,585
37	811 E. 16th Street	Haggard Park HD	Gerald T. Schultz and Karen J. Bowen 811 E. 16th Street Plano, TX 75074	Approval	75%	\$348,740	\$1,172	\$212	\$3,462	\$4,847
38	815 E. 16th Street	Haggard Park HD	Travis Hamilton 802 E. 15th Street Plano, TX 75074	Approval	75%	\$82,239	\$276	\$50	\$816	\$1,143
39	819 E. 16th Street	Haggard Park HD	Michael Dagate 819 E. 16th Street Plano, TX 75074	Approval	75%	\$192,161	\$646	\$117	\$1,908	\$2,671
40	901 E. 16th Street	Haggard Park HD	Coolik Family Trust c/o Russell Coolik 901 E. 16th Street Plano, TX 75074	Approval	75%	\$189,594	\$637	\$115	\$1,882	\$2,635
41	907 E. 16th Street	Haggard Park HD	Richard McKee 907 E. 16th Street Plano, TX 75074	Approval	75%	\$157,994	\$531	\$96	\$1,569	\$2,196
42	805 17th Street	Haggard Park HD	Bertha Cardenas 805 17th Street Plano, TX 75074	Approval	75%	\$99,801	\$335	\$61	\$991	\$1,387
43	809 17th Street	Haggard Park HD	L.A. Whitley 809 17th Street Plano, TX 75074	Approval	75%	\$48,497	\$163	\$30	\$481	\$674
44	813 17th Street	Haggard Park HD	John and Kathleen Brooks 813 17th Street Plano, TX 75074	Approval	75%	\$205,725	\$692	\$125	\$2,042	\$2,859
45	816 17th Street	Haggard Park HD	Clint M. Haggard 7352 Independence Parkway Frisco, TX 75035	Approval	75%	\$67,397	\$227	\$41	\$669	\$937
46	907 17th Street	Haggard Park HD	Larry Westbrook 907 17th Street Plano, TX 75074	Approval	75%	\$66,786	\$225	\$41	\$663	\$928

Attachment A (continued)

		Heritage Landmark/Heritage District (HD)	Owner's Mailing Address per CCAD	Staff Recommendation	Tax Exemption Percentage	2020 Improvement Value	Plano City (CPL) 0.4482%	Collin College (JCN) 0.081222%	Plano ISD (SPL) 1.32375%	Estimated Exemption for 2021
47	911 17th Street	Haggard Park HD	PMM Enterprises LLC c/o Patricia M. Mason 2413 Neal Drive Garland, TX 75040	Approval	75%	\$34,910	\$117	\$21	\$347	\$485
48	913 17th Street	Haggard Park HD	Charlene and Nathanael Ritter 913 17th St. Plano, TX 75074	Approval	75%	\$39,709	\$133	\$24	\$394	\$552
49	810 18th Street	Haggard Park HD	Dora Palao 810 18th St. Plano, TX 75074-5829	Approval	38%	\$54,759	\$93	\$17	\$275	\$386
50	811 18th Street	Haggard Park HD	Muhammad R. & Tasleem R. Gaziani 811 18th St. Plano, TX 75074-5828	Approval	38%	\$1,000	\$2	\$0	\$5	\$7
51	812 18th Street	Haggard Park HD	Spence Charles E and Henry Etta 106 Salsbury Circle Murphy, TX 75094-4122	Approval	38%	\$68,543	\$117	\$21	\$345	\$483
52	903 18th Street	Haggard Park HD	Aierzzip LLC Attn: Nathan Hale 903 18th St., Ste 125 Plano, TX 75074	Approval	38%	\$606,134	\$1,032	\$187	\$3,049	\$4,268
53	910 18th Street	Haggard Park HD	Ronald P. Thompson 121 Rolling Ridge Holly Lake Ranch, TX 75765	Approval	38%	\$160,641	\$274	\$50	\$808	\$1,131
54	913 18th Street	Haggard Park HD	Lumar Ventures, Inc. 913 18th Street Plano, TX 75074	Approval	38%	\$144,413	\$246	\$45	\$726	\$1,017
55	920 18th Street	Haggard Park HD	Ergonis Family Living Trust c/o Joe Ergonis 3353 Remington Drive Plano, TX 75023	Approval	38%	\$307,385	\$524	\$95	\$1,546	\$2,165
56	1517 G Avenue	Haggard Park HD	ETR Investments, LLC 800 E. Campbell Rd. Ste. 337 Richardson, TX 75081-1873	Approval	38%	\$349,377	\$595	\$108	\$1,757	\$2,460
57	1521 G Avenue	Haggard Park HD	S.A. Graves 1521 G Avenue Plano, TX 75074	Approval	75%	\$63,703	\$214	\$39	\$632	\$885
58	1600 H Avenue	Haggard Park HD	Coolik Family Trust c/o Russell Coolik 901 E. 16th Street Plano, TX 75074	Approval	75%	\$119,921	\$403	\$73	\$1,191	\$1,667

Attachment A (continued)

	Property Location	Heritage Landmark/Heritage District (HD)	Owner's Mailing Address per CCAD	Staff Recommendation	Tax Exemption Percentage	2020 Improvement Value	Plano City (CPL) 0.4482%	Collin College (JCN) 0.081222%	Plano ISD (SPL) 1.32375%	Estimated Exemption for 2021
59	1603 H Avenue	Haggard Park HD	Carol Armstrong 1603 H Avenue Plano, TX 75074	Approval	75%	\$146,238	\$492	\$89	\$1,452	\$2,033
60	1607 H Avenue	Haggard Park HD	Becky Armstrong 1607 H Avenue Plano, TX 75074	Approval	75%	\$170,399	\$573	\$104	\$1,692	\$2,368
61	1611 H Avenue	Haggard Park HD	Pamela Holland 1611 H Avenue Plano, TX 75074	Approval	75%	\$131,987	\$444	\$80	\$1,310	\$1,834
62	1701 H Avenue	Haggard Park HD	Jonathan Kuo-En Tang 1701 H Avenue Plano, TX 75074	Approval	75%	\$276,693	\$930	\$169	\$2,747	\$3,846
63	1706 H Avenue	Haggard Park HD	Dragon Road LLC Yan Lu 2701 W. 15th St. #289 Plano, TX 75075	Approval	75%	\$123,992	\$417	\$76	\$1,231	\$1,723
64	1715 H Avenue	Haggard Park HD	Young Dean Homestead Ltd. 625 W. Blondy Jhune Road Lucas, TX 75002	Approval	38%	\$186,168	\$317	\$57	\$936	\$1,311
65	1003-07 E. 15th Street	Downtown HD	Eng & Wong Plano Downtown LLC 7005 Chase Oaks Blvd., Suite 200 Plano, TX 75025	Approval	38%	\$2,006,113	\$3,417	\$619	\$10,091	\$14,127
66	1004 E. 15th Street	Downtown HD	Metropolitan Mammoth Jack, Ltd. 3838 Oak Lawn Avenue; Suite 1416 Dallas, TX 75219	Approval	38%	\$449,971	\$766	\$139	\$2,263	\$3,169
67	1008 E. 15th Street	Downtown HD	Crider Living Trust 3013 Crooked Stick Dr Plano, TX 75093	Approval	38%	\$460,069	\$784	\$142	\$2,314	\$3,240
68	1010 E. 15th Street	Downtown HD	LPW Real Estate Investment LLC 719 Cougar Dive Allen, TX 75013	Approval	38%	\$339,455	\$578	\$105	\$1,708	\$2,390
69	1011 E. 15th Street	Downtown HD	N A T Properties LLC 1014 15th Place Plano, TX 75074	Approval	38%	\$685,249	\$1,167	\$211	\$3,447	\$4,826

Attachment A (continued)

	Property Location	Heritage Landmark/Heritage District (HD)	Owner's Mailing Address per CCAD	Staff Recommendation	Tax Exemption Percentage	2020 Improvement Value	Plano City (CPL) 0.4482%	Collin College (JCN) 0.081222%	Plano ISD (SPL) 1.32375%	Estimated Exemption for 2021
70	1012 E. 15th Street	Downtown HD	JSMTX Properties LLC c/o Judith Moore 6800 Del Norte Lane, Apt 245 Dallas, TX 75225	Approval	38%	\$315,257	\$537	\$97	\$1,586	\$2,220
71	1013 E. 15th Street	Downtown HD	Pierce Family Living Trust Ronald & Deborah Pierce Trustees 39 Vanguard Way Dallas, TX 75243	Approval	38%	\$462,000	\$787	\$143	\$2,324	\$3,253
72	1016 E. 15th Street	Downtown HD	JSMTX Properties LLC c/o Judith Moore 6800 Del Norte Lane, Apt 245 Dallas, TX 75225	Approval	38%	\$135,000	\$230	\$42	\$679	\$951
73	1017 E. 15th Street	Downtown HD	Comert Estates LLC c/o Selim Comert 1017 E. 15th Street Plano, TX 75074	Approval	38%	\$981,113	\$1,671	\$303	\$4,935	\$6,909
74	1018 E. 15th Street	Downtown HD	JSMTX Properties LLC c/o Judith Moore 6800 Del Norte Lane, Apt 245 Dallas, TX 75225	Approval	38%	\$105,386	\$179	\$33	\$530	\$742
75	1020 E. 15th Street	Downtown HD	CRH Rentals Ltd. 800 Central Parkway, Suite 100 Plano, TX 75074	Approval	38%	\$92,198	\$157	\$28	\$464	\$649
76	1021 E. 15th Street	Downtown HD	Tvg Holdings LLC 455 Bee Caves Road Lucas, TX 75002-7370	Approval	38%	\$178,934	\$305	\$55	\$900	\$1,260
77	1022 E. 15th Street	Downtown HD	15th Street Real Property Holdings, LLC 1022 E. 15th Street Plano, TX 75074	Approval	38%	\$590,137	\$1,005	\$182	\$2,969	\$4,156
78	1024 E. 15th Street	Downtown HD	JSMTX Properties LLC c/o Judith Moore 6800 Del Norte Lane, Apt 245 Dallas, TX 75225	Approval	38%	\$239,544	\$408	\$74	\$1,205	\$1,687
79	1026 E. 15th Street & 1421 K Avenue	Downtown HD	Sutton-1012 LLC c/o Richard Sutton 5577 Linhurst Court Fairview, TX 75069	Approval	38%	\$507,389	\$864	\$157	\$2,552	\$3,573
80	1029 E. 15th Street	Downtown HD	Mirna Lynch 4604 Lawson Court Plano, TX 75093	Approval	38%	\$534,523	\$910	\$165	\$2,689	\$3,764

Attachment A (continued)

	Property Location	Heritage Landmark/Heritage District (HD)	Owner's Mailing Address per CCAD	Staff Recommendation	Tax Exemption Percentage	2020 Improvement Value	Plano City (CPL) 0.4482%	Collin College (JCN) 0.081222%	Plano ISD (SPL) 1.32375%	Estimated Exemption for 2021
81	1031-1033 E. 15th Street	Downtown HD	MKNS, LLC P.O. Box 262447 Plano, TX 75026-2447	Approval	38%	\$244,210	\$416	\$75	\$1,228	\$1,720
82	1032 E. 15th Street	Downtown HD	Connor Chaddick Chaddick Center Leasing Office 1201 E. 15th Street, Suite 201 Plano, TX 75074	Approval	38%	\$420,887	\$717	\$130	\$2,117	\$2,964
83	1035 E. 15th Street	Downtown HD	Audience Inc 4906 Shady Knolls Drive Parker, TX 75002-2728	Approval	38%	\$526,971	\$898	\$163	\$2,651	\$3,711
84	1037 E. 15th Street	Downtown HD	Joerg & Cathy Fercher 628 Water Oak Dr. Plano, TX 75025	Approval	38%	\$182,823	\$311	\$56	\$920	\$1,287
85	1410-12 J Avenue	Downtown HD	Brodhead Family Ltd. Partnership P O Box 865123 Plano, TX 75086	Approval	38%	\$447,140	\$762	\$138	\$2,249	\$3,149
86	1418 K Avenue	Downtown HD	PMM Enterprises LLC c/o Patricia M. Mason 2413 Neal Drive Garland, TX 75040	Approval	38%	\$196,500	\$335	\$61	\$988	\$1,384
87	1422-1428 K Avenue/ 1112 E. 15th Street	Downtown HD	Las Brisas Properties 1002 Marion Drive Garland, TX 75042	Approval	38%	\$1,764,633	\$3,005	\$545	\$8,877	\$12,427
						\$ 26,239,477	\$66,114	\$11,981	\$195,265	\$273,359

Attachment B - Properties Ineligible for 2021 Heritage Tax Exemption

	Property Location	Heritage Landmark/ Heritage District (HD)	Owner's Mailing Address per CCAD	Staff Recommendation	Tax Exemption Percentage	2020 Improvement Value	Plano City (CPL) 0.4482%	Collin College (JCN) 0.081222%	Plano ISD (SPL) 1.32375%	Estimated Exemption for 2021
1	609 E. 16th Street	Mitchell House Haggard Park HD	Mason T. Mitchell 4501 Rock Creek Lane Frisco, TX 75034	Denied	100%	\$63,434	\$284	\$52	\$840	\$1,176
2	901 18th Street	Olney Davis House Haggard Park HD	AAG LLC Alison Lebeck Garcia 901 18th Street Plano, TX 75074	Denied	50%	\$368,327	\$825	\$150	\$2,438	\$3,413
						\$431,761.00	\$1,110	\$201	\$3,278	\$4,588

February 12, 2021

City of Plano
1520 K Avenue
Plano, Texas 75074
Vi email



ALISON LEBECK GARCIA
Attorney and Counselor at Law

Lebeck@Law

901 18th Street
Plano, Texas 750

RE: 2021 Heritage Tax Exemption Denial

Dear Mr. Mittal:

Thank you for sending me this letter; I have not received anything in the mail. I have to ask that the City Counsel appeal this decision during their next meeting on February 22, 2021;

I now realize that the chimney needs repair but I did not know this would cause my denial (or when I bought the house that there was any issue at all, but that like most of these issues were undisclosed and as you know numerous) but is something I have finally found a workable estimate to begin work with. Please advise what I need to do to begin repairs. Do I need a permit or because it is required by the City, may I simply begin? If I can begin, I can have it done within a week of the weather's cooperation.

Also, do I need to do anything before I repaint the sign and attach my logo with information?

I can not appeal the decision for your stated reasons, but must regardless as so much work has been done on this house since we purchased it and I can promise these repairs before March's end (unless I need to get approvals on the chimney as discussed above). As you know the porch was in shambles and is now lovely. The yard was full of dead trees, plants and was over-grown and last year looked so pretty and will again this spring. Washing the home made such a difference and inside so much was in horrible repair (too much to detail) and is now lovely. Replacing the 5 broken AC with 2 better units looks so much better. We have spent so very much and plan to do so many more improvements and do truly need this exception to help fund these plans. Any tax savings will be poured back into the home; I love the house and want to make it as wonderful as it can be. Future plans involve restoring the inside ceiling to period appropriate panels and I need save to repaint the entire exterior.

I additionally ask for the exception to be granted to me as COVID and its backlash has so severely impacted me. I had 7 signed leases for April 1, 2020 for all the offices upstairs. No one moved in; due to current landlord restrictions, I have no recourse. Renting offices in a pandemic when most work from home has proven impossible. Outside of this loss of planned revenue to support the building, COVID has made repairs and estimates problematic. My windows alone were missing in transit for months. I am also someone who is high-risk with high-risk family members, I have been really hesitant to meet with as many

repair people as I would have in pre-pandemic days; this has made renovations all the harder and why many have taken me longer than anticipated.

Finally, I hope my involvement in the community, even in a pandemic, might be a small credit in my favor. The house was apart of the City's Halloween movie that was a blast to be in and I welcomed the City to use it in any way needed. I offered this again at Christmas. I find it charming with the house's history that my son now attends PISD virtually from within; I feel Mr. Davis would have really liked that. After the pandemic, I want to be involved in tours and all City programs as apart of Plano history.

Please give me the tax savings this year. You will see the money will be used to improve the home.

Warmest Regards,

A handwritten signature in black ink, appearing to read 'ALG', is centered on the page. The signature is fluid and cursive.

Alison Lebeck Garcia

February 1, 2021

Alison Lebeck Garcia
AAG LLC
901 18th Street
Plano, TX 75074

RE: 2021 Heritage Tax Exemption Denial

Dear Ms. Garcia:

Staff recently inspected your property at **901 18th Street** for compliance with the heritage tax exemption program. As you may know, the purpose of the exemption program is to provide tax savings to be reinvested in the property for proper maintenance. After inspecting the property on January 7, 2021, staff has reviewed the applicable eligibility requirements in Section 20-55 of the Heritage Tax Exemption Ordinance and found your property to be **non-compliant** with the following requirements:

- 1. The structure and site are in compliance with the City's Zoning Ordinance and Heritage Preservation Ordinance**
- 2. All repairs required from a previous tax exemption inspection have been completed by the established deadline.**

Based upon the outstanding violation related to the brick chimney repair with the Property Standards Division, and the outstanding repair(s) from the last property survey completed in 2020 (see attached survey form), your property has been deemed **ineligible** for a 2021 heritage tax exemption. You can reapply to the program next year provided the repairs are completed and the property is in compliance with Section 20-55 of the Heritage Tax Exemption Ordinance by January 1, 2022. An application form is available at www.historicplano.org.

You have the ability to appeal this determination to the City Council as outlined in Section 20-59 of the Heritage Tax Exemption Ordinance. Appeals will be considered during the February 22, 2021 regular meeting at 7:00 pm in the Senator Florence Shapiro Council Chambers of the Plano Municipal Center at 1520 K Avenue. Should you decide to appeal to City Council, a signed letter must be submitted to the Heritage Preservation Officer by 5:00 pm on February 12, 2021. Appeals shall be limited to evidence that staff incorrectly deemed the property ineligible or to present new evidence that the required repairs were completed prior to January 1, 2021.

If you have any questions, please contact me at (972) 941-7151. Thank you for your efforts to protect and preserve Plano's heritage!

Sincerely,



Bhavesh Mittal
Heritage Preservation Officer

901 18th Street**2014 Survey Comments not addressed:**

- Repair and paint third floor gutter at the west facade (P). Repair is outstanding since 2014.
- Repair and paint second floor porch fascia and cornice at the east facade (P). Repair is outstanding since 2014.

Repair chimney cap on the brick chimney—Outstanding violation with the Property Standards Division of Neighborhood Services Department.



INSPECTION ELEMENTS	CONDITION	COMMENTS
1. Structure which is vacant is securely closed to prevent unauthorized entry		
2. Exterior surface painted to prevent decay		
3. Grounds maintained, free of excessive dead vegetation, garbage, junk or refuse		
4. Screens & shutters maintained in good repair		
5. No broken windows		
6. Exterior doors & doorways maintained in good repair		
7. Skirting around structure in good repair		
8. Porch flooring and supports maintained in sound condition, capable of bearing an imposed load		
9. Railings/handrails of exterior stairs, balconies, and porches in sound condition for safety		
10. No rotted exterior wood		
11. No broken or missing gutters or downspouts		
12. No loose bricks or stones in the exterior structure (visible from street) and all joints weatherproofed		
13. Fences and exteriors of accessory building in good repair, including painting if applicable		
14. Roof and roofing materials shall be maintained in good repair		
15. Trim and decorative work must be maintained and painted		
16. Other Remarks:		2014 Survey Comments not addressed: Repair and paint third floor gutter at the west facade (P). Repair and paint second floor porch fascia and cornice at the east facade (P). Repair chimney cap on the brick chimney—Outstanding violation with the Property Standards Division of Neighborhood Services Department

2021 Heritage Tax Exemption Survey Form

Building/Site Element

A building/site element refers to an exterior architectural or landscape feature and/or its individual subcomponents. For example, a window is a building element with individual subcomponents such as muntins, panes, screens, sill, shutters, trim, etc.

Conditions

A classification system of "Good," "Fair," "Poor," & "Non-Permitted Construction" conditions (or ratings) has been established to assist property owners understand the necessary action they should take to sufficiently address the deficiencies listed in the report (including those necessary to remain eligible in the tax exemption program):

1. Good Condition (G) - An element is evaluated as **Good (G)** when:

- a. The element is intact, structurally sound, and performing its intended purpose.
- b. There are few or no imperfections that detract from the overall visual appearance of the structure.
- c. The element needs no repair or minor/routine maintenance (paint touch-up, overgrown vegetation, leaf debris on the roof, cleaning).

Property Owner Course of Action

No immediate action is required. Please contact Heritage Preservation Officer (HPO) at 972-941-7151 before addressing the minor/routine maintenance conditions as these items may require a Certificate of Appropriateness.

2. Fair Condition (F) - An element is evaluated as **Fair (F)** when:

- a. There are early signs of wear, failure, or deterioration (building cracks, paint), though the element is generally structurally sound and performing its intended purpose.
- b. There are minor imperfections that detract from the overall appearance of the structure.
- c. Up to 25% of the element is in need of repair and/or replacement.

Property Owner Course of Action

The property owner should contact the HPO to discuss a repair/replacement strategy and timeline. This will help prevent the further deterioration, which may result in a "Poor" rated condition in future inspections. Please contact the HPO at 972-941-7151 before addressing the repairs as these items may require a Certificate of Appropriateness.

3. Poor Condition (P) - An element is evaluated as **Poor (P)** when:

- a. The element shows signs of imminent failure or breakdown, or is no longer performing its intended purpose.
- b. There are major imperfections that detract from the overall appearance of the structure.
- c. The element is missing or damaged.
- d. Over 25% of the element is in need of repair or replacement.
- e. The element requires immediate repair/replacement to prevent further deterioration.
- f. Repairs were completed, installed, or currently under construction without a Certificate of Appropriateness.
- g. "Maintenance" or "Minor in-kind Repair and Replacements" were performed inappropriately, as defined by the Heritage Preservation Ordinance. (For example, the repair or maintenance included a change in design, material, or outward appearance.)

Property Owner Course of Action

The property owner should promptly contact the HPO to discuss a repair/replacement strategy. A repair deadline of January 1, 2022 has been established for completing these repair/maintenance items. Completion of repairs by the deadline is necessary to remain eligible for program participation in 2022. 'Poor' rated conditions may be appealed to the Heritage Commission. Please contact the HPO at 972-941-7151 before addressing the repairs as these items may require a Certificate of Appropriateness.

4. Non-Permitted Construction (N) - A **Non-Permitted Construction (N)** assessment is determined when:

- a. Any exterior work (excluding "Maintenance") was completed, installed, or is currently under construction without a Certificate of Appropriateness.
- b. Any exterior work was completed, installed, or is currently under construction in deviation of a previously approved Certificate of Appropriateness.

Property Owner Course of Action

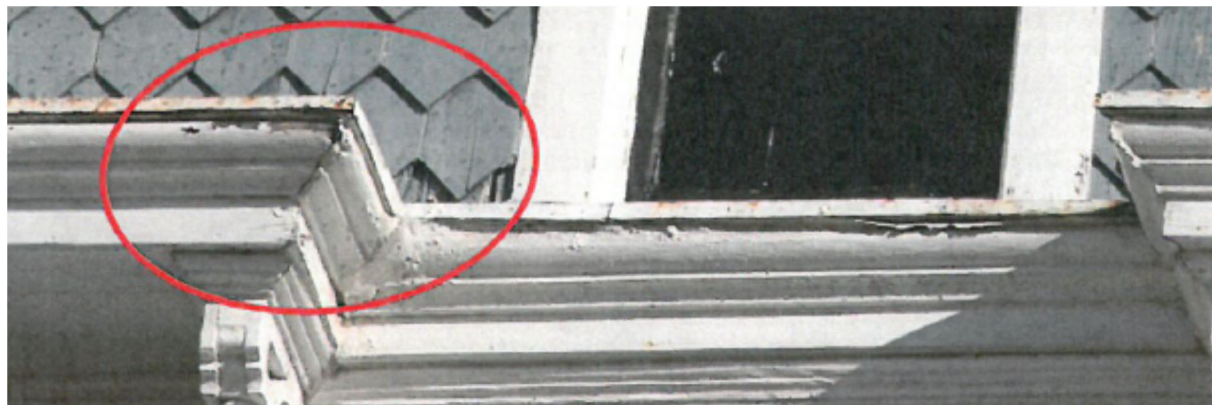
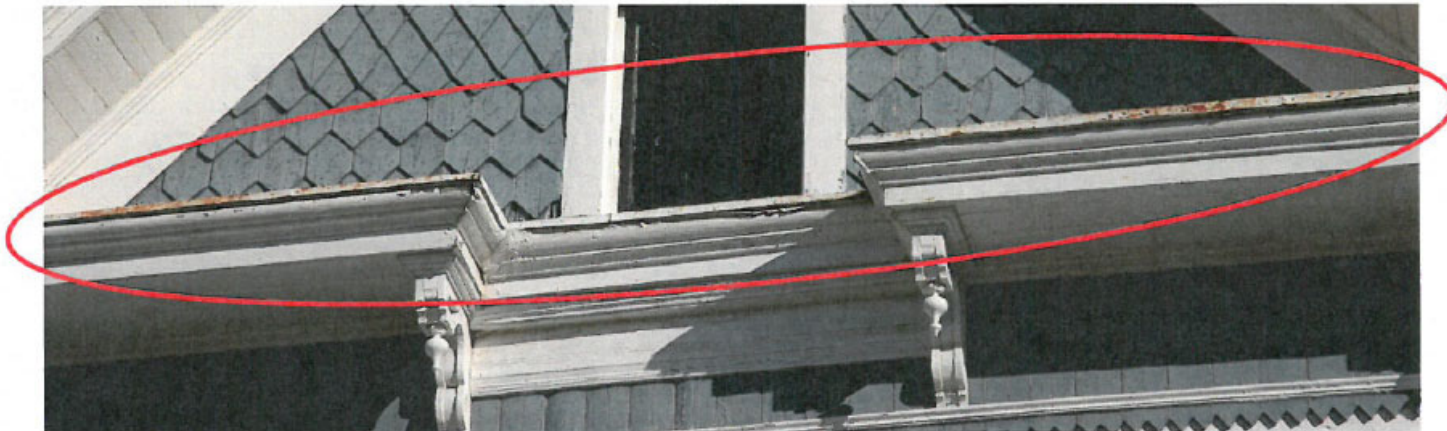
The property owner should immediately contact the HPO at 972-941-7151. If the element was completed, installed, or is currently under construction without Certificate of Appropriateness or in deviation of an approved Certificate of Appropriateness, the property may be ineligible for program participation during the current evaluation and taxing year.

901 18th Street

2014 Survey Photos



2020 Survey Photos



2014 Survey comments not addressed: Repair and paint third floor gutter at the west facade (P)

901 18th Street

2021 Survey Photos



2014 Survey comments not addressed: Repair and paint third floor gutter at the west facade (P)

901 18th Street

2014 Survey Photo



2020 Survey Photo



2021 Survey Photo



2014 Survey comments not addressed: Repair and paint second floor porch fascia and cornice at the east facade (P).

901 18th Street

2021 Survey Photo



Repair chimney cap on the brick chimney—Outstanding violation with the Property Standards Division of Neighborhood Services Department



Property Standards
7501-A Independence Parkway
Plano, TX 75025
Tel: 972.208.8150
Fax: 972.208.8158

City of Plano
P.O. Box 860358
Plano, TX 75086-0358
Tel: 972.941.7000
plano.gov

January 15, 2020

OWNER

AAG LLC
Alison Lebeck Garcia, Manager AAG LLC
3200 Lester Drive
Richardson, TX 75082

CASE NO: PS20-00432
RE: 901 18TH ST

Dear AAG LLC:

As a result of a recent inspection, the above referenced property did not meet minimum standards established by the City of Plano Code of Ordinances. The enclosed **Substandard Deficiency List** details the conditions found and the corrections required to bring the property into compliance.

According to the real property records of Collin County, Texas, you own the real property described in this notice. If you no longer own the property, you must execute an affidavit stating that you no longer own the property and stating the name and last known address of the person who acquired the property from you. The affidavit must be delivered in person or by certified mail, return receipt requested, to this office no later than the 20th day after the date of this notice. If you do not send the affidavit, it may be presumed that you own the property described in this notice, even if you do not.

Please be advised that you have 30 days from the date of this notice (February 14, 2020) to complete the repair(s) listed on the enclosed deficiency list. If a building permit is required, the compliance time frame as specified in this notice remains in effect and is NOT extended by the permit. If the repair(s) is not completed within the time specified, the City may: (i) proceed to cause the work to be done and charge the costs thereof against you and your property; (ii) issue a Notice/Summons to Appear in Municipal Court which could result in a fine not to exceed Two thousand dollars (\$2,000.00) for each and every day that the violation exists; and/or (iii) request a public hearing before the Building Standards Commission (BSC). If the property is referred to the BSC and is found to be in violation of the minimum standards established by ordinance, the Commission may order, depending on the type and the severity of violation, the property vacated, secured, repaired, removed, or demolished within a specified time. If the ordered actions are not made in the specified time, the BSC may also order the City to make any necessary repairs and file a lien upon the real estate referenced above for the charges incurred.

Please be advised that you may appeal this notice to Building Standards Commission at 1520 K Avenue, Suite 150, Plano, TX 75074. The appeal, as outlined in Code of Ordinance Section 6-50, Subsection 111.1, must be in writing, received within 20 days from the date of service of this notice. An application for appeal shall be based on a claim that the true intent of this code or the rules legally adopted thereunder have been incorrectly interpreted, the provisions of this code do not fully apply, or the requirements of this code are adequately satisfied by other means. Failure to appeal as outlined in the aforementioned requirements will constitute a waiver of all rights to any administrative hearing and adjudication of the notice.

If you have any questions, comments or concerns regarding this notice, please contact me at Property Standards Department, 7501-A Independence Pkwy or by telephone (972) 208-8150.

DEFICIENCY LIST

Please apply a protective treatment to areas of the fascia, trim, and other areas of chipped or peeling paint or where bare wood is exposed. IPMC Section 304.2, All exterior surfaces, including but not limited to, doors, door and window frames, cornices, porches, trim, balconies, decks and fences shall be maintained in good condition. Exterior wood surfaces, other than decay-resistant woods, shall be protected from the elements and decay by painting or other protective covering or treatment. Peeling, flaking and chipped paint shall be eliminated and surfaces repainted. All siding and masonry joints as well as those between the building envelope and the perimeter of windows, doors, and skylights shall be maintained weather resistant and water tight. All metal surfaces subject to rust or corrosion shall be coated to inhibit such rust and corrosion and all surfaces with rust or corrosion shall be stabilized and coated to inhibit future rust and corrosion.

Please repair the chimney cap on the brick chimney. IPMC Section 304.11, All chimneys, cooling towers, smoke stacks, and similar appurtenances shall be maintained structurally safe and sound, and in good repair.

Please repair the damaged window at the front dormer above the second floor porch. IPMC Section 304.13, Window, skylight and door frames. Every window, skylight, door and frame shall be kept in sound condition, good repair and weather tight.

Please repair the skirting along the rear of the structure and the damaged wood shingles at the dormers along the roof line. IPMC Section 304.6, All exterior walls shall be free from holes, breaks, and loose or rotting materials; and maintained weatherproof and properly surface coated where required to prevent deterioration.

Please repair the trim at the southwest corner of the roof of the 2nd floor porch. CoO Section 6-52, Subsection 304.9, Overhang extensions including, but not limited to eaves, fascia, soffits, canopies, marquees, signs, metal awnings, fire escapes, standpipes and exhaust ducts shall be maintained in good repair and be properly anchored so as to be kept in a sound condition. Where required, all exposed surfaces of metal or wood shall be protected from the elements and against decay or rust by periodic application of weather-coating materials, such as paint or similar surface treatment.



Property Standards
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Plano, TX 75025
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Fax: 972.208.8158

City of Plano
P.O. Box 860358
Plano, TX 75086-0358
Tel: 972.941.7000
plano.gov

A permit may be required to complete the above repairs. Please contact Building Inspections Department at (972) 941-7140 to determine what permits are required. Please present this deficiency list to Building Inspections at the time of permit application.

Code of Ordinance Art III. Section 6-45 International Property Maintenance Code.

STACY BURDETTE
Property Standards Specialist
stacyb@plano.gov
Neighborhood Services Department

Si usted necesita ayuda en español por favor llame al teléfono (972) 208-8150.