



Guidelines for the Lomond Revitalization Program

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(A) Definitions

The following words and phrases have the following meanings in the Guidelines.

- (1) “Association” means the Lomond Association.
- (2) “City” means the City of Shaker Heights.
- (3) “Committee” means the Lomond Revitalization Program Committee of the Association.
- (4) “Fund” means the Fund for the Future of Shaker Heights.
- (5) “Home” means the single-family or the two-family home for which a homeowner seeks a matching grant.
- (6) “Homeowner” means the owner(s) of a home, the grantee(s) as determined by the County Auditor and/or Recorder.
- (7) “Matching grant” means a grant awarded to a homeowner by the Committee that the homeowner may obtain as reimbursement for money spent by the homeowner on the project, at the rate of fifty cents on the dollar.
- (8) “Neighborhood” means the Lomond neighborhood as defined by the Association.
- (9) “Owner-occupied” means the homeowner lives in the home as his or her place of residence.
- (10) “Program” means the Lomond Revitalization Program of the Association.
- (11) “Project” means a home improvement for which a homeowner seeks a matching grant.
- (12) “Project period” means the period beginning February 14, 2009, and ending on the date the matching grant money is released to the homeowner by the Association.
- (13) “Rental unit” means a dwelling unit within a two-family home that the homeowner either is renting to a third-party pursuant to a rental agreement, or intends to rent after completing the project.
- (14) “Selection panel” means the group of neutral third-parties delegated by the Committee to choose the homeowners to whom the Committee will award matching grants.
- (15) “Single-family home” means a home that was built as a dwelling unit for a one family.
- (16) “Two-family home” means a home that was built with two separate dwelling units for two separate families, including homes with a legal third floor dwelling unit.

(B) Purpose

The purpose of the Program is to enhance the value of homes and the aesthetics of the neighborhood by awarding matching grants to homeowners for projects that improve homes in the areas of the neighborhood that were not covered by the Avalon-Daleford, or the Winslow, matching grant programs that were funded by the Fund. The Fund awarded \$150,000 to the Association to fund the Program.

(C) Administration

The Association is administering the Program through the Committee using the money provided by the Fund. The Committee is responsible for the implementation and administration of the Program, including the awarding of matching grants to homeowners and overseeing the completion of projects, and for exercising due diligence in doing so. The Fund is responsible for releasing matching grant money to the Association for the homeowner after completion of the project. The decisions of the Association, the Committee and the Fund are final.

(D) Matching Grants

- (1) The Committee will award the matching grants in two categories:
 - (a) Up to \$7,500 to the homeowner of a two-family home for an exterior project and/or an interior project that is limited to the kitchen and/or bathroom of the rental unit(s).
 - (b) Up to \$5,000 to the homeowner of a single-family home for an exterior project if the homeowner:
 - (i) Lives in the single-family home (owner-occupied),
 - (ii) Partners with a homeowner of a two-family home who submits a *Step Two: Homeowner's Application* by March 31, 2009, in accordance with (F)(2)(b) of the Guidelines, and
 - (iii) Is not the homeowner of the two-family home.
- (2) A goal of the Program is to award at least 50% of the matching grants to homeowners of two-family homes, and about 50% of the matching grants to homeowners of single-family homes.
- (3) The Program will not award more than one matching grant to a homeowner.
- (4) In awarding matching grants, the Committee will weigh the following factors:
 - (a) Homes located on streets on or west of Ingleside.
 - (b) Two-family homes that are owner-occupied.

- (c) Projects involving a single-family homeowner partnering with a two-family homeowner.
 - (d) Projects that involve significant improvements to the exterior appearance of the portions of the home that are visible from the street (“scope of project”).
 - (e) Homeowners who were members of the Association on January 1, 2009.
 - (f) Projects that, in combination with other projects, create a critical mass in the vicinity (“big splash”).
 - (g) Other factors to be determined by the Committee.
- (5) The Fund will disburse matching grant money to the Association to reimburse the homeowner, up to the amount of the matching grant, upon satisfactory proof that the homeowner spent his or her own money to pay expenses incurred in executing the project. The Association will not be able to release matching grant money to the homeowner until the Fund releases the money to the Committee. Expenses incurred by the homeowner prior to receipt of a *Step Two: Committee’s Matching Grant Award & Letter to Proceed with Project* (Appendix 6) are not reimbursable.

(E) Basic Criteria

In addition to the other criteria in the Guidelines, the following basic criteria apply throughout the project period. All criteria must be met as a condition for payment of matching grant money. From time to time as determined by the Committee, the homeowner must provide documents verifying that the criteria are met.

- (1) Homeowners:
 - (a) Must spend at least \$1,000 of their own money in the project.
 - (b) Must be and remain either current “full” member status in the Association if they live in the neighborhood, or “contributing” member status if they do not live in the neighborhood.
 - (c) Must complete the workshop that the Committee will present that will cover topics such as selecting a contractor, tenant screening, the Shaker Certified program, the right and obligations of homeowners, landlords and tenants.
 - (d) Must not previously have received a grant for any home through the Avalon-Daleford, or the Winslow, grant programs that were funded by the Fund.

- (e) Must apply for a matching grant together with all the homeowners of the home.
 - (f) Must pay a one-time, non-refundable processing fee of \$10 (cash or money order only) at the time of pre-application.
- (2) Homes:
- (a) Must be located in the neighborhood, and must not be located: on Avalon or Daleford between Chagrin and Lomond; or on Winslow.
 - (b) Must be and remain in “in good standing” as determined by the City Housing Inspection Department, and not involved in Housing Court or the nuisance abatement process.
 - (c) Must not have had a criminal nuisance activity call to the City since January 1, 2008, and the homeowner must work with the City to address any criminal nuisance activity call that occurs during the project period.
 - (d) Throughout the project period, must be:
 - (i) Current in real estate tax payments as determined by the County Treasurer.
 - (ii) Current in mortgage payments as determined by the mortgagee, and not involved in the foreclosure process.
 - (iii) Current in homeowner’s insurance as determined by the insurance agency.
 - (e) Throughout the project period, rental units must have either a current Certificate of Occupancy or an exemption from the City, and be in compliance, as determined by the City.
- (3) Projects:
- (a) The homeowner must plan and complete the project in cooperation with the Committee, in consultation with the Cleveland Restoration Society, in compliance with all City codes, and according to the Guidelines. The Committee: may identify conditions that must be remedied as part of the project, and improvements that must take precedence; and will ensure that all improvements are reasonable and prudent, as well as architecturally and historically appropriate.
 - (b) If applicable to the project and available to the homeowner, the homeowner must use the City’s free paint and Exterior Maintenance programs instead of grant money. Go to <http://www.shakeronline.com/about/incentive> for details.

- (c) The homeowner must obtain all permits and approvals required for the project, and the project must pass all inspections, as determined by the City. If the homeowner uses a contractor for any work on the project, the homeowner must ensure that the contractor is registered with the City if required by the City.
- (d) For rental units involved in the projects, the Committee will arrange to have the units inspected by the Neighborhood Revitalization office of the City and the project must meet the criteria of the Shaker Certified program.
- (e) A project must be architecturally and historically appropriate, as well as reasonable and prudent. A significant portion of an exterior project must improve the exterior appearance of the portions of the home that are visible from the street.
 - (i) Examples of potentially approvable projects:
 - Painting
 - Sidewall shingle replacement or repair
 - Window or door replacement or repair
 - Driveway replacement or repair
 - Garage door replacement or repair
 - Roof replacement or repair
 - Shutter replacement, repair or installation
 - Masonry replacement, repair or cleaning
 - Gutter and downspout replacement or repair
 - Garage replacement or repair
 - Safety improvements, such as lighting, or removal of overgrown shrubbery or dead trees
 - Hardscaping improvements, such as installation of stone pathways or retaining walls
 - (ii) Examples of unapprovable exterior projects:
 - Landscaping
 - Rear patios
 - Rear parking pads
 - Rear porches or decks
 - Siding
 - (iii) Example of unapprovable kitchen and bathroom projects:
 - Appliances
 - (iv) Approvable paint color selections:
 - All exterior color selections must be consistent with the Shaker Village palette, and approved by the Committee
 - All interior color selections must be approved by Shaker Certified.

(F) Process & Timeline

The Committee will make decisions utilizing the Guidelines, and the following steps and timetable.

(1) Step One: Pre-Application

- (a) In the pre-application process, the Committee will determine which homeowners appear to meet the basic criteria in the Guidelines and therefore may go to Step Two to compete for a matching grant for a project.
- (b) By February 14, 2009, the homeowner must submit to the Committee a completed *Step One: Homeowner's Pre-Application* (Appendix 1) together with a one-time, non-refundable processing fee of \$10 (cash or money order only).
- (c) If the Committee determines that it appears the homeowner may meet the basic criteria in the Guidelines, the Committee will approve the pre-application and the homeowner may go to Step Two to compete for a matching grant for the project. If the Committee determines that it appears the homeowner does not meet the basic criteria in the Guidelines, the Committee will deny the pre-application and the homeowner may not go to Step Two.
- (d) The Committee will inform the homeowner of its decision by mailing a *Step One: Committee's Decision on Homeowner's Pre-Application* (Appendix 2) to the homeowner by about February 21, 2009.

(2) Step Two: Application

- (a) In the application process, the Selection Panel will evaluate the competing applications and determine the homeowners to whom the Committee will offer matching grants.
- (b) By March 31, 2009, the homeowner must submit to the Committee a completed *Step Two: Homeowner's Application* (Appendix 3).
- (c) After the homeowner has submitted an application, the Committee will review the project proposed in the application and will visit home (site visit) sometime between about April 4 and April 18, 2009. The site visit will involve the homeowner and the Cleveland Restoration Society, and may involve the City, the Neighborhood Revitalization office of the City and others as determined necessary by the Committee. The purpose of the site visit is to determine whether the project proposed in the application meets all the criteria in the Guidelines, to provide the opportunity for the Committee and the homeowner to consider any revisions of the application that may be needed, and to assist the homeowner in finalizing

the application. The Committee will utilize *Step Two: Committee's Project Application Worksheet* (Appendix 3A) in the inspection process. In order to resolve concerns that arise during the inspection process, the homeowner may submit a revised application or an amendment to the Committee by April 19, 2009.

- (d) After the site visit, if the Committee determines that the project proposed in the homeowner's application meets all the criteria in the Guidelines, the Committee will submit the application to the Selection Panel. If the Committee determines that the project does not meet all the criteria in the Guidelines, the Committee will inform the homeowner of the Committee's decision by providing the homeowner a *Step Two: Committee's Decision Denying Homeowner's Application* (Appendix 5) by April 21, 2009, stating that: either the Committee will not submit the application to the Selection Panel; or the Committee will submit the application to the Selection Panel only if the homeowner agrees to certain revisions of the application and the homeowner accepts the revisions by signing the *Homeowner's Acceptance* at the bottom of the decision and submitting it to the Committee by April 23, 2009.
- (e) On about April 25, 2009, the Committee will submit to the Selection Panel the applications that meet all the criteria in the Guidelines, along with instructions for factors the panel is to use in selecting the winning applications.
- (f) If the Selection Panel determines that the homeowner has submitted a winning application, the Selection Panel will recommend that the Committee approve the project proposed in the application and offer a matching grant to the homeowner in an amount determined by the Selection Panel. The Committee will accept the recommendations of the Selection Panel and will inform the homeowner of the Committee's decision by mailing a *Step Two: Committee's Decision Approving Homeowner's Application* (Appendix 4) to the homeowner by about April 30, 2009. The Selection Panel may also create a prioritized waiting list for the Committee to use in the event circumstances permit.
- (f) If the homeowner wishes to accept the matching grant, the homeowner must sign the *Homeowner's Acceptance* at the bottom of the *Step Two: Committee's Decision Approving Homeowner's Application* (Appendix 4) and submit it, together with an executed IRS Form W-9 (Request for Taxpayer Identification Number and Certification), to the Committee by May 15, 2009. The matching grant is null and void if the homeowner does not sign and submit the *Homeowner's Acceptance*, together with the executed W-9, to the Committee by May 15, 2009.
- (g) If the homeowner signs the *Homeowner's Acceptance* at the bottom of the *Step Two: Committee's Decision Approving Homeowner's Application* (Appendix 4) and submits it, together with the executed W-9, to the

Committee by May 15, 2009, the Committee will award the matching grant to the homeowner. The Committee will inform homeowner of the matching grant by mailing a *Step Two: Committee's Matching Grant Award & Letter to Proceed with Project* (Appendix 6) to the homeowner by May 22, 2009. After receiving the *Step Two: Committee's Matching Grant Award & Letter to Proceed with Project* (Appendix 6) the homeowner may begin the project, and after completing the project approved by the Committee the homeowner may go to Step Three to seek reimbursement, up to the amount of the matching grant, according to the Guidelines.

- (h) Before making any changes in the project approved by the Committee, the homeowner must obtain prior written approval from the Committee. If the homeowner wishes to make changes in the project, the homeowner must submit to the Committee a written proposal explaining the proposed changes; the Committee will inform the homeowner of its decision in writing.
- (i) If the Selection Panel determines that the homeowner does not meet all the criteria in the Guidelines, or has not submitted a winning application, the Selection Panel will recommend that the Committee deny the application and the homeowner may not go to Step Three. The Committee will accept the recommendations of the Selection Panel and will inform the homeowner of the Committee's decision by mailing a *Step Two: Committee's Decision Denying Homeowner's Application* (Appendix 5) to the homeowner by about April 30, 2009.

(3) Step Three: Reimbursement

- (a) In the reimbursement process, the Fund will release matching grant money to the Association, up to the amount of the matching grant, for the homeowner upon satisfactory proof that the homeowner has completed the project as approved by the Committee and meets all the criteria of the Guidelines. After the Association receives the matching grant money from the Fund, the Association will release matching grant money to the homeowner.
 - (i) Expenses incurred by the homeowner prior to receipt of a *Step Two: Committee's Matching Grant Award & Letter to Proceed with Project* (Appendix 6) are not reimbursable.
 - (ii) The homeowner must request reimbursement by submitting a single *Step Three: Homeowner's Request for Reimbursement from the Fund for the Future* (Appendix 9).
 - (iii) The homeowner may not begin the reimbursement process until after completing the project as approved by the Committee.

- (b) After completing the project, the homeowner must notify the Committee. The Committee and the homeowner will inspect the home to determine whether the homeowner completed the project as approved by the Committee. The inspection(s) may involve the Cleveland Restoration Society, the City, the Neighborhood Revitalization office of the City, and others as determined necessary by the Committee. After the inspection(s), the Committee will determine whether the homeowner has completed the project as approved by the Committee, or whether the homeowner must do additional work to complete the project as approved by the Committee. The Committee will inform the homeowner of its decision by mailing a *Step Three: Committee's Project Completion Inspection Report* (Appendix 7) to the homeowner. The homeowner must pass the Committee's inspection(s) in order to continue the reimbursement process.
- (c) After the Committee determines that the homeowner completed the project as approved by the Committee, the Committee will determine whether the homeowner meets the following criteria. The Committee will inform the homeowner of its decision by mailing a *Step Three: Committee's Reimbursement Checklist* (Appendix 8) to the homeowner. The homeowner must meet the criteria in order to continue the reimbursement process. The criteria are:
- (i) The homeowner completed the Committee's workshop.
 - (ii) The homeowner maintained membership in the Association.
 - (iii) The homeowner spent at least \$1,000 of own money in the project.
 - (iv) The homeowner remained current in homeowner's insurance for the home.
 - (v) The homeowner was not eligible for the City's free paint and Exterior Maintenance programs for the project.
- (d) By December 31, 2009, the homeowner must submit to the Fund a completed *Step Three: Homeowner's Request for Reimbursement from the Fund for the Future* (Appendix 9). The homeowner must attach to the request the following documents:
- (i) The *Step Three: Committee's Project Completion Inspection Report* (Appendix 7) showing the Committee determined that the homeowner completed the project as approved by the Committee.
 - (ii) The *Step Three: Committee's Reimbursement Checklist* (Appendix 8) showing the Committee determined that the homeowner met the criteria listed in subsection (c) above.

- (iii) Documents that satisfy the Fund's requirements for reimbursements: All receipts and appropriate verification of money spent for all materials and labor for the project as approved by the Committee. For homeowner purchases, this means itemized receipts for purchases together with: credit card receipts for credit card purchases; copies of canceled checks for purchases by check; vendor statements for cash purchases; a copy of the purchase agreement, including the details the terms of the agreement and the signatures of the parties (homeowner plus the vendor, supplier, contractor, etc.), for purchases made with "6 months same as cash" or similar deferred payment agreements. For money paid to a contractor, this means a detailed account from the contractor of the contractor's labor, material and other costs, together with a credit card receipt or cancelled check showing the homeowner's payment to the contractor.

- (e) After receiving a *Step Three: Homeowner's Request for Reimbursement from the Fund for the Future* (Appendix 9) from the homeowner, the Fund will check with the City to determine whether the City issued a permit for all work involved in the project that required a permit, and the City has inspected and approved all such work. The home must meet that criteria in order to continue the reimbursement process.

- (f) The Fund will release matching grant money, up to the amount of the matching grant, to the Association to release to the homeowner if the homeowner has provided the documents listed in subsection (d) above and the home meets the criteria listed in subsection (e) above. If the homeowner and/or the home do not meet those criteria, the Fund will inform the homeowner and the Association what the Fund requires to release money and/or why the Fund will not release money. The Committee will try to help the homeowner resolve any issues or concerns about the release of money by the Fund.

- (g) The Association will report to taxing authorities as required by law regarding the matching grant money released to the homeowner, including submitting an IRS Form 1099 to the U.S. Internal Revenue Service.

- (4) At all steps, the Association, the Committee and the Fund will exercise due diligence and may, for example: review public records; ask the homeowner to provide additional information or documents; ask the City or other third-parties to provide additional information or documents; meet with the homeowner and others; ask the homeowner for permission to inspect the home with the homeowner, the Cleveland Restoration Society, the City and other third-parties for purposes related to the project; etc.

(G) Responsibilities & Disclaimer

- (1) The Association and the Committee are responsible for implementing and administering the Program utilizing the Guidelines as interpreted by the Committee, and may revise the Guidelines from time to time as they deem necessary. But, they do not take on any additional responsibility by awarding a matching grant to a homeowner. And, they disclaim any of the responsibilities of the homeowner.
- (2) The homeowner is responsible for everything any homeowner is responsible for when doing a home improvement project. In addition, the homeowner is responsible for completing the project as approved by the Committee and according to the Guidelines in order to obtain matching grant money. For example, the homeowner is solely responsible for:
 - (i) Implementing and executing the project according to the Guidelines, including obtaining all permits from and passing all inspections as required by the City, providing documentation of expenses prior to obtaining matching grant money as required by the Committee, etc.
 - (ii) Any contracting with contractors and other third-parties related to the project, including quality of work issues, payment of contractors, and resolution of disputes related to the contracts, etc.
 - (iii) Defending any claims for personal or property damage related to the project, including claims related to damage caused by contractors and other third-parties, etc.
 - (iv) Handling all tax matters related to receipt of matching grant money, including determining whether any taxing authorities require the homeowner to report receipt of the matching grant money.
- (3) By applying for a matching grant, the homeowner agrees to abide by the Guidelines.

Lomond Revitalization Program 2009

Step One: Homeowner's Pre-Application for Lomond Revitalization Program
Due Date: February 14, 2009

Please print

Homeowner (*information about the individual(s) who are applying for a matching grant*)

Full name(s) of all property owners as they appear on the deed filed with the County Auditor and/or Recorder: _____

Residence address of homeowner(s): _____

Land line: _____ Cell Phone: _____ E-mail: _____

Home (*information about the project for which the homeowner is seeking a matching grant*)

Address of the home at which the project will be done if different from homeowner's residence address above: _____

Type of home: ___ Single-family occupied by the homeowner

___ Two-family, homeowner occupies both units

___ Two-family, homeowner occupies one unit and rents the other unit

___ Two-family, homeowner rents both units

Type of project (check all that apply): ___ Exterior work ___ Kitchen or bathroom of rental

Total estimated cost of project: \$ _____ unit in a two-family

Brief description of the project: _____

Yes No **Homeowner's good faith statements:**

___ ___ All homeowners on the deed for the home are applying together.

___ ___ Will spend at least \$1,000 of own money in the project.

___ ___ Are and will remain a current member in the Lomond Association throughout the project period

Continued on next page

**Continuation of
Step One: Homeowner's Pre-Application for Lomond Revitalization Program**

Yes No Homeowner's good faith statements (continued):

- Will complete the workshop that the Committee will present.
- Have not received a grant for any home from the Avalon-Daleford, or the Winslow, matching grant programs that were funded by the Fund for the Future.
- The home is not located on Avalon or Daleford between Chagrin and Lomond, or on Winslow.
- Current in mortgage payments for the home.
- Not delinquent in taxes
- Not eligible for the City's free paint or Exterior Maintenance programs, or those programs do not apply to the project
- For the rental unit(s) in the home, have a current Certificate of Occupancy or an exemption from the City, and the rental units are in compliance.
- Have reviewed or will review the Guidelines, and will comply with them.
- The home is in "in good standing" as determined by the City.
- The home has not had a criminal nuisance activity call to the City since 1/1/08.
- Have attached a document from homeowner's insurance company showing home insurance is current.
- Will pay the one-time, non-refundable processing fee of \$10 (cash or money order only) with this pre-application.

Partner(s) *(if the homeowner is partnering with someone else, put partner's information here, otherwise, leave blank ... partner must submit own pre-application)*

Full name(s): _____

Residence address: _____

Land line: _____ Cell Phone: _____ E-mail: _____

Address of the home at which the partner's work will be done: _____

Homeowner's Signature(s) *(all homeowners named in the deed must sign):*

_____ **Date:** __/ __/ 09

_____ **Date:** __/ __/ 09

For More Information Contact

Office of Fund for the Future:	491-1457
Lomond Revitalization Program E-Mail:	lomondgrant@gmail.com
Lomond Association Website:	lomondonline.com

Lomond Revitalization Program 2009

Contact Information - email: lomondgrant@gmail.com / phone: 491-1457

**Step One: Committee’s Decision on Homeowner’s Pre-Application
for the Lomond Revitalization Program**

To: (homeowner)
(street address)
(city & state)
From: The Lomond Revitalization Program Committee
Date: mm/dd/yyyy
Re: Decision on your pre-application

_____ We are pleased to inform you that we have determined that it appears you may meet the basic criteria in the Guidelines. You may go to Step Two to compete for a matching grant for your project. Please submit your application to us by March 31, 2009. For more information, please review the Guidelines.

_____ Committee’s comments: _____

_____ We regret to inform you that we have determined that it appears you do not meet the basic criteria in the Guidelines. Reason:

- ___ All homeowners did not apply.
- ___ Homeowner did not agree to spend at least \$1,000 of own money in the project.
- ___ Homeowner not a current member of the Association.
- ___ Homeowner did not agree to complete the Committee’s workshop.
- ___ Homeowner received a grant from the Avalon-Daleford, or the Winslow, program.
- ___ Home is located on Avalon or Daleford between Chagrin and Lomond, or on Winslow.
- ___ Home is not “in good standing” as determined by the City, or home is in Housing Court or in nuisance abatement.
- ___ Home has had a criminal nuisance activity call to the City since 1/1/08.
- ___ Homeowner not current in mortgage payments or home is in foreclosure.
- ___ Homeowner not current in real estate tax payments for the home.
- ___ Homeowner not current in homeowner’s insurance for the home.
- ___ Homeowner eligible for the City’s free paint and Exterior Maintenance programs for the project.
- ___ For the rental unit(s) in the home, no current Certificate of Occupancy or exemption, or not in compliance.
- ___ Applicant is not the homeowner.
- ___ Project involves a single-family home that is not owner-occupied.
- ___ Project involves a single-family home without a two-family partner.

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**Continuation of
Step One: Committee's Decision on Homeowner's Pre-Application
for the Lomond Revitalization Program**

- Project involves a single-family home but homeowner is also a homeowner of the two-family home.
- Home is not in Lomond neighborhood.
- Project exclusively involves interior work other than kitchen and/or bath of the rental unit in a two-family.
- Project exclusively involves work listed as unapprovable in the Guidelines
- Other _____

If you disagree with our decision or think we have made a mistake, you may ask us to reconsider. We will reconsider if you: (1) provide us additional information or explanation to show that our reason(s) above is incorrect; and (2) contact us Committee by phone or e-mail within 7 calendar days after the date above.

For More Information Contact

Office of Fund for the Future:	491-1457
Lomond Revitalization Program E-Mail:	lomondgrant@gmail.com
Lomond Association Website:	lomondonline.com

Lomond Revitalization Program 2009

Contact Information - email: lomondgrant@gmail.com / phone: 491-1457

**Step Two: Homeowner's Application for the Lomond Revitalization Program
Due Date: March 31, 2009**

Please print

Homeowner (*information about the individual(s) who are applying for a matching grant*)

Full name(s) of all property owners as they appear on the deed filed with the County Auditor and/or Recorder: _____

Residence address of homeowner(s): _____

Land line: _____ Cell Phone: _____ E-mail: _____

Home (*information about the project for which the homeowner is seeking a matching grant*)

Address of the home at which the project will be done if different from homeowner's residence address above: _____

Type of home: Single-family occupied by the homeowner

Two-family, homeowner occupies both units

Two-family, homeowner occupies one unit and rents the other unit

Two-family, homeowner rents both units

Type of project (check all that apply): Exterior work Kitchen or bathroom of rental unit in a two-family

Partner(s) (*if the homeowner is partnering with someone else, put partner's information here, otherwise, leave blank ... partner must submit own pre-application*)

Full name(s): _____

Residence address: _____

Land line: _____ Cell Phone: _____ E-mail: _____

Address of the home at which the partner's work will be done: _____

Other projects in the vicinity of your project

If you know about any other homeowners who are applying for matching grants for homes in the vicinity of your project, please give their name(s) and/or the address(es) of the homes they want matching grants for:

Detailed description of the proposed project: Please complete the next page.

Homeowner's Signature(s) (*all homeowners named in the deed must sign*):

_____ **Date:** __/__/09

_____ **Date:** __/__/09

Continued on Next Page

**Continuation of
Step Two: Homeowner’s Application for the Lomond Revitalization Program**

Detailed description of the project.

- Use this page to give the Committee a detailed, itemized description of the project, including materials (wood, concrete, brass, etc), colors, etc. Attach additional pages if needed.
- Attach contracts or estimates (include information requested above), drawings, photos, color chips, model numbers, etc. to help the Committee understand and evaluate your project.

Describe the Work	Contractor? Homeowner?	Estimated Cost
<i>Examples</i> (1) Front door: replace with solid wood, six panel door, painted black, with solid brass hardware (2) Walkway from front sidewalk to house: replace concrete with flagstone path	ABC Builders Homeowner	\$900 contractor bid & photos attached \$300 materials

Total Estimated Cost \$ _____

Lomond Revitalization Program 2009

Contact Information - email: lomondgrant@gmail.com / phone: 491-1457

Step Two: Committee's Project Application Worksheet

Please print

Home (*information about the project for which the homeowner is seeking a matching grant*)

Address of the home at which the project will be done if different from homeowner's residence address above: _____

Cleveland Restoration Society comments (Name: _____ Date: _____)

Neighborhood Revitalization comments (Name: _____ Date: _____)

Committee comments (Name: _____ Date: _____)

Lomond Revitalization Program 2009

Contact Information - email: lomondgrant@gmail.com / phone: 491-1457

**Step Two: Committee's Decision Approving Homeowner's Application
for the Lomond Revitalization Program**

To: (homeowner)
(street address)
(city & state)
From: The Lomond Revitalization Program Committee
Date: mm/dd/yyyy
Re: Approval of your application

We are pleased to inform you that:

We are pleased to inform you that we have approved the project proposed in your application and offer you a matching grant of \$_____.

You must sign and complete both the *Homeowner's Acceptance* below and the attached IRS Form W-9, and return both of them to us by May 15, 2009, if you wish to accept the matching grant. Our offer of the matching grant is null and void if we do not receive them by that date. If we receive them by that date, we will mail a *Step Two: Committee's Matching Grant Award & Letter to Proceed with Project* (Appendix 6) to you by May 22, 2009. Do not do any work on your project until after you receive the letter. Expenses you incur before you receive the letter are not reimbursable. For more information, please review the Guidelines.

Homeowner's Acceptance (Due Date: May 22, 2009)

I accept the matching grant and I have attached my executed IRS Form W-9. I will not do any work on my project until after I receive the *Step Two: Committee's Matching Grant Award & Letter to Proceed with Project* (Appendix 6). After that, I will complete the project as approved above.

Homeowner's Signature(s) (all homeowners named in the deed must sign):

Print: _____ Sign: _____ Date: __/ __/ 09
Print: _____ Sign: _____ Date: __/ __/ 09

Lomond Revitalization Program 2009

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Step Two: Committee's Decision Denying Homeowner's Application for the Lomond Revitalization Program

To: (homeowner)
(street address)
(city & state)
From: The Lomond Revitalization Program Committee
Date: mm/dd/yyyy
Re: Denial of your application

___ We have determined that the project you proposed in your application does not meet all the criteria in the Guidelines. We will not submit it to the Selection Panel unless you agree to the following revisions by signing the *Homeowner's Acceptance* at the bottom of the next page and submitting it to us by April 23, 2009.

___ We regret to inform you that we have determined that you do not meet all criteria in the Guidelines and/or did not submit a winning application.. Reason:

- ___ After reviewing all the applications submitted by the Committee, the Selection Panel determined that your application did not score high enough to win a matching grant.
- ___ All homeowners did not apply.
- ___ Homeowner did not agree to spend at least \$1,000 of own money in the project.
- ___ Homeowner not a current member of the Association.
- ___ Homeowner did not agree to complete the Committee's workshop.
- ___ Homeowner received a grant from the Avalon-Daleford, or the Winslow, program.
- ___ Home is not "in good standing" as determined by the City, or home is in Housing Court or nuisance abatement.
- ___ Home has had a criminal nuisance activity call to the City since 1/1/08.
- ___ Homeowner not current in mortgage payments or home is in foreclosure.
- ___ Homeowner not current in real estate tax payments for the home.
- ___ Homeowner not current in homeowner's insurance for the home.
- ___ Homeowner eligible for the City's free paint and Exterior Maintenance programs for the project.
- ___ For the rental unit(s) in the home, no current Certificate of Occupancy or exemption, or are not in compliance.
- ___ Applicant is not the homeowner.

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**Continuation of
Step Two: Committee's Decision Denying Homeowner's Application
for the Lomond Revitalization Program**

- Project involves a single-family home that is not owner-occupied.
- Project involves a single-family home without a two-family partner.
- Project involves a single-family home but homeowner is also a homeowner of the two-family home.
- Home is not in Lomond neighborhood.
- Project exclusively involves interior work other than kitchen and/or bath of the rental unit in a two-family.
- Project exclusively involves work listed as unapprovable in the Guidelines.
- Other _____

Committee Comments: _____

Homeowner's Acceptance (Due Date: April 23, 2009)

I accept the Committee's revisions to my application and revise my application accordingly.

Homeowner's Signature(s) (*all homeowners named in the deed must sign*):

Print: _____ Sign: _____ Date: __/ __/ 09
 Print: _____ Sign: _____ Date: __/ __/ 09

Lomond Revitalization Program 2009

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Step Two: Committee's Matching Grant Award & Letter to Proceed with Project for the Lomond Revitalization Program

To: (homeowner)
(street address)
(city & state)
From: The Lomond Revitalization Program Committee
Date: mm/dd/yyyy
Re: Award of matching grant and letter to proceed

Congratulations! We have received your acceptance of the matching grant of \$_____.

You may begin work on your project. After you have completed your project, you may go to Step Three to claim reimbursement, up to the amount of the matching grant, according to the Guidelines. For more information, please review the Guidelines.

We have attached:

- Your *Step Two: Homeowner's Application for the Lomond Revitalization Program*
- Our *Step Two: Committee's Decision Approving Homeowner's Application*

Please review both documents, and the Guidelines, to ensure that you complete the project as approved by the Committee.

Also, please review the following information, and the Guidelines, about the process you will have to follow and the documents you must have in order to seek reimbursement from the matching grant.

You may seek reimbursement from matching grant only after you complete your project as approved by the Committee. In order for you to seek reimbursement, after you complete the project we and/or the Fund must determine that:

- You completed the project as approved by the Committee.
- The home remained "in good standing" as determined by the City.
- You completed the Committee's workshop.
- You maintained your membership in the Association.
- You spent at least \$1,000 of own money in the project.
- Either the home has not had any criminal nuisance activity calls to the City since February 14, 2009, or you worked with the City to address the calls.
- You remained current in your mortgage payments for the home.
- You remained current in your homeowner's insurance for the home.
- You were not eligible for the City's free paint and Exterior Maintenance programs for the project.
- If you used a contractor for any work on the project, the contractor was registered with the City if required by the City.

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**Continuation of
Step Two: Committee's Matching Grant Award & Letter to Proceed with Project
for the Lomond Revitalization Program**

- The City issued permits and approvals for all work involved in the project that required permits or approvals, and the City has inspected and issued final approval of all such work.

In addition, you must have documents that satisfy the Fund for the Future's requirements for reimbursements: All receipts and appropriate verification of money spent for all materials and labor for the project as approved by the Committee. . For homeowner purchases, this means itemized receipts for purchases together with: credit card receipts for credit card purchases; copies of canceled checks for purchases by check; vendor statements for cash purchases; a copy of the purchase agreement, including the details the terms of the agreement and the signatures of the parties (homeowner plus the vendor, supplier, contractor, etc.), for purchases made with "6 months same as cash" or similar deferred payment agreements. For money paid to a contractor, this means a detailed account from the contractor of the contractor's labor, material and other costs, together with a credit card receipt or cancelled check showing the homeowner's payment to the contractor.

Please keep careful and complete records of all you expenses to avoid problems getting reimbursed.

Please contact us whenever you have any questions or concerns about the completing the project, about the reimbursement process, or about anything else related the Lomond Revitalization Program.

Lomond Revitalization Program 2009

Contact Information - email: lomondgrant@gmail.com / phone: 491-1457

**Step Three: Committee's Project Completion Inspection Report
for the Lomond Revitalization Program**

To: (homeowner)
(street address)
(city & state)
From: The Lomond Revitalization Program Committee
Date: mm/dd/yyyy
Re: Results of project completion inspection

___ Passed: The Committee has determined you have completed the project as approved by the Committee. Please contact us so we may assist you in completing the process for requesting reimbursement from your matching grant. Please review the *Step Two: Committee's Matching Grant Award & Letter to Proceed with Project* letter we sent you at the beginning of the project. For more information, please review the Guidelines.

___ Additional work required: The Committee has determined you have not completed the project as approved by the Committee. The following work must be done by _____ to complete the project before you may request reimbursement from your matching grant. After you have completed the work above, please contact the Committee to arrange for reinspection.

___ Did not pass. The Committee has determined you have not completed the project as approved by the Committee. You may not request reimbursement from your matching grant. Committee comments:

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Step Three: Committee's Reimbursement Checklist for the Lomond Revitalization Program

To: (homeowner)
(street address)
(city & state)
From: The Lomond Revitalization Program Committee
Date: mm/dd/yyyy
Re: Results of reimbursement checklist

___ Passed: Based on the checklist below, the Committee has determined you meet criteria below for reimbursement. Please contact us so we may assist you in completing the process for requesting reimbursement from your matching grant. Please review the *Step Two: Committee's Matching Grant Award & Letter to Proceed with Project* letter we sent you at the beginning of the project. For more information, please review the Guidelines.

___ Additional proof required: Based on the checklist below, the Committee has determined you have not yet meet all the criteria for reimbursement. By _____ please provide us documents showing you meet the items checked "NO" in the checklist

___ Did not pass. Based on the checklist below, the Committee has determined you do not meet all the criteria for reimbursement. You may not request reimbursement from your matching grant. Committee comments:

YES NO Checklist

- ___ ___ You completed the project as approved by the Committee.
- ___ ___ You completed the Committee's workshop.
- ___ ___ You maintained your membership in the Association.
- ___ ___ You spent at least \$1,000 of own money in the project.
- ___ ___ You remained current in your homeowner's insurance for the home.
- ___ ___ You were not eligible for the City's free paint and Exterior Maintenance programs for the project.
- ___ ___ You used a contractor for work on the project, and the contractor registered with the City, if required by the City.

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Step Three: Homeowner's Request for Reimbursement from the Fund for the Future

To: The Fund for the Future
From: (homeowner)
(street address)
(city & state)
(land line & cell phone)
Date: mm/dd/yyyy
Re: Request for reimbursement

I request that the Fund release a total of \$_____ to the Association to reimburse me for expenses incurred in completing the project approved by the Committee.

I have attached:

- The *Step Three: Committee's Project Completion Inspection Report* (Appendix 7).
- The *Step Three: Committee's Reimbursement Checklist* (Appendix 8).
- All receipts and appropriate verification of money spent for all materials and labor for the project as approved by the Committee. For homeowner purchases, this means itemized receipts for purchases together with: credit card receipts for credit card purchases; copies of canceled checks for purchases by check; vendor statements for cash purchases; a copy of the purchase agreement, including the details the terms of the agreement and the signatures of the parties (homeowner plus the vendor, supplier, contractor, etc.), for purchases made with "6 months same as cash" or similar deferred payment agreements. For money paid to a contractor, this means a detailed account from the contractor of the contractor's labor, material and other costs, together with a credit card receipt or cancelled check showing the homeowner's payment to the contractor.

I understand that you will check with the City to determine whether the City issued permits and approvals for all work involved in the project that required permits and approvals, and the City has inspected and issued final approval of all such work. The home must meet those criteria in order for me to continue the reimbursement process.

If you have any issues or concerns about this request, please contact me and the Committee so we can try resolve them.