



City of Ocala
 Community Redevelopment Agency
 201 SE 3rd Street, Ocala, FL 34471

M E M O R A N D U M

DATE February 26, 2025
 TO: East Ocala CRA Advisory Committee
 FROM: Marie Mesadieu, Economic Development Specialist
 RE: East Ocala Residential Property Improvement Grant Application CRA24-0009

Address: 926 NE 5th Street (Parcel: 2831-104-000)

Applicant(s): Loretta Wheeler and David Wheeler

Project Description: The applicant is requesting a grant to replace the shingle roof with a metal. An HVAC replacement will also be done. A summary of the work items and quotes received are presented in Table 1.

Table 1. Application Summary

Application ID	Address	Scope of work	High Bid(s)	Low Bid(s)	Maximum CRA grant that can be awarded based on 75% match.
CRA24-0009	926 NE 5 th Street	Roof replacement	\$20,638.00	\$19,900.00	
		HVAC replacement	\$12,800.00	\$11,375.00	
		Total	\$33,438.00	\$31,275.00	
<i>To receive the maximum grant of \$20,000.00, the project cost for eligible work must be at least \$26,666.00</i>					\$20,000.00

Findings and Conclusion:

- The home was built in 1953, and the applicants acquired it in 1993.
- The roof is not holding up to manufacturing age. Shingles are showing heavy wear and is in need to be replaced.
- The roof type will change from shingle to metal.
- The new roof will be easier to maintain and will improve the visual appearance of the home and the community.
- Currently, the gas HVAC system is not functional, applicants are requesting to replace it with an electric system.
- The new HVAC will improve the living condition of the applicants and will be more functional to the home.

- These improvements are included on the Priority work elements on the East Ocala CRA framework.
- The application meets the requirements of the grant program and is eligible for consideration.

The Grant Review Committee (GRC) visited the property on December 10, 2024. Please refer to the images below for highlights of the existing condition. The full application is also attached.

Plan compliance: "1,392 structures, representing approximately 68.4 percent of the structures in the East Ocala CRA have issues concerning Quality of Structure....a concentration of older, poorly maintained and deteriorated buildings creates many negative influences in an area including a loss of economic status, a lack of interest in new development, and increased occurrence of crime, and decreased revenues for businesses." (*The East Ocala Redevelopment Plan*)

Attached - Application form, Cost estimates, Photographs of existing conditions, and Marion County Property Appraiser's property report card.



Image 1- Existing roof condition



Image 2 Existing roof condition



Image 3. Existing HVAC (outside unit)



Image 4. Existing HVAC (inside unit)

CITY OF OCALA - EAST OCALA REDEVELOPMENT AREA RESIDENTIAL PROPERTY IMPROVEMENT GRANT APPLICATION

(Completed application and all required attachments must be submitted)

PROJECT INFORMATION

Project Name: LORETTA WHEELER ROOF
Project Address: 926 NE 5th STR OCALA FL
Parcel Number: R2831-104-000

APPLICANT INFORMATION

Applicant's Name:
LORETTA WHEELER

Name of person to receive all correspondence if different from applicant:

Agent's Name (if applicable): _____

Agent's Mailing Address: _____

City: _____ State: _____ Zip: _____

Phone number: ³⁵² 629-3152 Fax: _____

E-mail address: LORWHE 352 @AOL.COM

How long have you owned / lived at the current location? 1993

PROJECT DESCRIPTION:

If necessary, attach additional sheets addressing the following:

Explain the purpose of and need for the proposed improvements.

the shingle Roof is not holding up to AGE-WEATHER
Need A NEW ROOF, I would like to get a
NEW ROOF before the Fla Citizens Ins I
MADE WONT ACCEPT the Current ONE.

Would the proposed improvements be made without the assistance of the grant program? If not, please explain.

Just not yet, I have no funds. I would have to apply for a personal loan, we have installed the last 2 roofs ourselves. Not an option due to our age asking for a needing assistance

PROJECT COSTS & SCHEDULE

Estimated cost of project based on attached submitted low bid. \$ 20,000.00

Required -- Attach itemized bid sheets.

How much funding assistance are you requesting? \$ 15,000.00 (75%)

Anticipated start date: 12.14.24 Anticipated completion date: 12.30.24

GENERAL CONDITIONS

It is expressly understood and agreed that the applicant shall be solely responsible for all safety conditions and compliance with all safety regulations, building codes, ordinances, and other applicable regulations.

- * It is expressly understood and agreed that the applicant will not seek to hold the City of Ocala, the Grant Review Committee (Committee) and/or its agents, employees, board members, officers and/or directors liable for any property damage, personal injury, or other loss relating in any way to the Program.

It is expressly understood and agreed that the applicant will hold harmless the City, its agents, officers, employees and attorneys for all costs incurred in additional investigation or study of, or for supplementing, redrafting, revising, or amending any document (such as an Environmental Impact Report, specific plan, or general plan amendment) if made necessary by said proceeding and if the applicant desires to pursue such approvals and/or clearances, after initiation of the proceeding, which are conditioned on the approval of these documents.

The applicant authorizes the City of Ocala to promote any approved project including but not limited to displaying a sign at the site, during and after construction, and using photographs and descriptions of the project in City of Ocala materials and press releases.

If the applicant fails to perform the work approved by the Committee, the City reserves the right to cancel the grant. The applicant also understands that any work started/completed before the application is approved by the Committee is done at their own risk, and that such work will jeopardize their grant award.

Completion of this application by the applicant DOES NOT guarantee that grant monies will be awarded to the applicant.



Applicant

I, LORETTA WHEELER, owner/occupant of building at 926 NE 55+ Ocala Fl 34470, have read and understand the terms and conditions of the Program and agree to the general conditions and terms outlined in the application process and guidelines of the Program.

Signature: Loretta Wheeler

Date: 11.18.2024

Property Information – For staff use only

Is the property assessed Marion County property taxes? Y / N

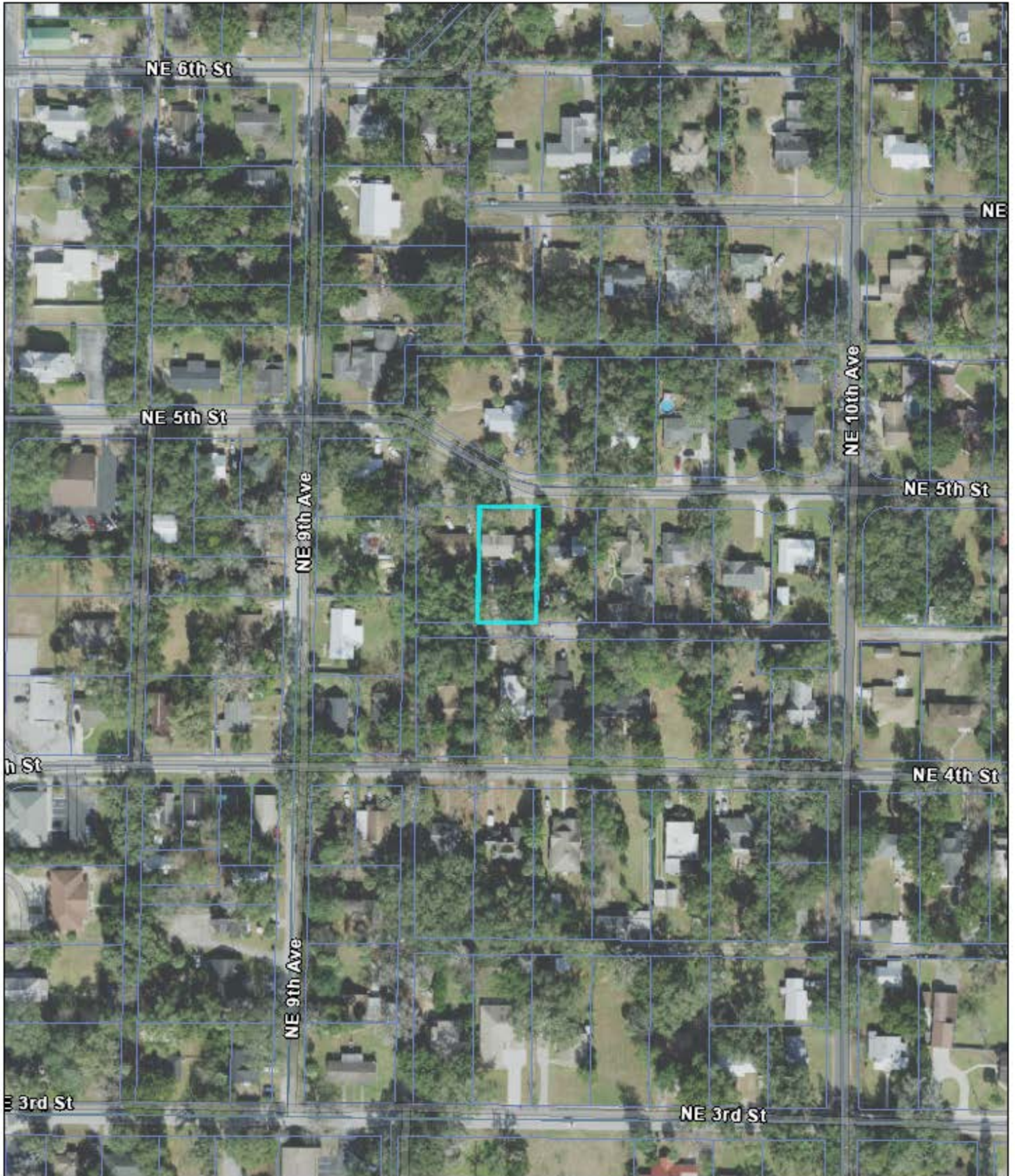
Are property taxes paid up to date? Y / N

Is the property in condemnation or receivership? Y / N

Is there an active City code enforcement case on the property? Y / N

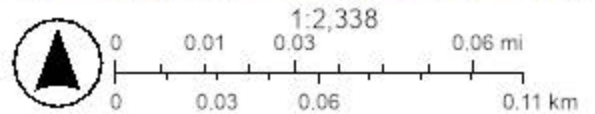
Is the building on the National Register of Historic Places? Y / N

926 NE 5th Street - Aerial Map



12/3/2024, 9:18:02 AM

-  Ocala Maintained Roads
-  City Limits
-  Parcels



Esri Community Maps Contributors, Marion County Property Appraiser, FDEP, © OpenStreetMap, Microsoft, Esri, TomTom, Garmin, SafeGraph, GeoTechnologies, Inc, METVNASA, USGS, EPA, NPS, US Census Bureau, USDA, USFWS, State of Florida, Maxar, Microsoft

926 NE 5th Street - Case Map

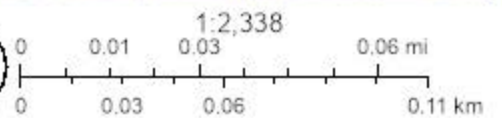


12/3/2024, 9:19:09 AM

Zoning

- B-1: Neighborhood Business
- R-1A: Single Family Residential
- R-3: Multi-Family Residential

- RO: Residential Office
- Ocala Maintained Roads
- City Limits
- Parcels



Esri Community Maps Contributors, Marion County Property Appraiser, FDEP, © OpenStreetMap, Microsoft, Esri, TomTom, Garmin, SafeGraph, GeoTechnologies, Inc, METVNASA, USGS, EPA, NPS, US Census Bureau, USDA, USFWS, State of Florida, Maxar, Microsoft

AHS

Air Conditioning / Heating Services

Andy Scharnagl - Owner

352-843-3468

Ray Powell

352-816-4845 www.ahsheatingair.com

Keeping it Simple and Affordable

AHS, LLC CAC1817865

10551 NE 109th St.

Archer, FL 32618

BILL TO:

Loretta Wheeler

926 NE 5th Street

Ocala, FL 34470

lorwhe352@aol.com

352-629-3152

INVOICE DATE

1-6-25

Proposal

Contract

Cash Credit Check

Installed

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
-	Install 2.5 Ton Grandaire 15 Beer 410-A split System. (Remove Gas System/Replace with Electric)		
-	Install New Metal Stand with Filter Cabinet for Closet		
-	Install New Honeywell T-STAT		
-	Install New Ductwork thru out house		
-	Install New Concrete Pad		
-	10 year Parts & Compressor Warranty		
-	1 year Labor Warranty		

Balance Due On Start-up

Thank You

DEPOSIT 2/3

SALES TAX

TOTAL DUE

11,375

Customer Signature

Date

Central Florida Heating & Air Conditioning

SERVICE INVOICE

Nº 16554



4100 SE 52nd Court
Ocala, Florida 34480
Lic. # CAC1814286

Marion (352) 369-0826 • Citrus (352) 637-0350

Date 11.7.24

NAME David Wheeler
STREET 926 NE 58t
SUBDIV. _____
CITY Ocala
STATE FL ZIP 34470
PHONE 352-342-2938

EMAIL _____ REFERRAL # _____

EQUIPMENT INSPECTED	
MODEL# _____	_____
SERIAL# _____	_____
DATE INSTALLED _____	_____

TODAY'S INSPECTION REPORT

Condensor _____ °F Suction
Suction _____ Head _____ Volt _____ AMPS

Condensor Coil _____ °F Ambient
°F Entering _____ °F Discharge

Coil Condition _____

Cabinet Condition _____

Refrigerant _____
Leaks _____ OK _____ Added _____

Condensor Fan Motor _____
Volt _____ Amps _____ Bearings _____

Evaporator _____
°F Return _____ °F Supply _____

Evaporator Coil Condition _____

Drain Pan & Line Condition _____

Cabinet Condition _____

Evaporator Fan Motor _____
Volt _____ Amps _____ Bearings _____

Air Filter _____
Cleaned _____ Replaced _____ OK _____

Electrical Components _____
Relay _____ Contactor _____
Overload _____ Pressure Switch _____

Controls _____
Thermostat _____ Humidistat _____

QUAN.	CODE	MATERIALS	PRICE
2	T0N	14.5 scv ² Fridg air AC	
		Matching case coil	
		54,900 BTU furnace	
		filter rack	
		float switch / Drg 7 stat	
		Disconnect	
7		6" supply ducts	
		8" round supply grills	
		New duct board plenum	
		1 yr labor / 10 yr parts	

CHK# _____	TOTAL <u>12,000.00</u>
FINANCED <u>ins</u>	PAID <u>800.00</u>
APP# _____	BALANCE DUE <u>12,800.00</u>

CC# _____

VISA MC

*NO RETURN ON ELECTRICAL COMPONENTS

*NO WARRANTY ON DRAIN LINES

Today's Recommendations:

800 flow in insulation

TERMS: Balance due and payable upon completion of work. All unpaid amounts accrue interest at 18% per annum (1 1/2% per month). Customer is owner of real property or is an authorized agent of owner. Customer agrees to pay all costs of collection, including attorney's fees, whether or not suit is filed. Venue for any action arising out of this transaction shall be in Marion County, Florida. A \$25.00 service charge will be required on all non-sufficient funds checks received.

Customer Signature _____ Service Man Jon

State Licensed and
Certified General
Contractor and Roofing
Contractor

Chuchian Roofing and Construction Inc.

Roofing Division CCC1328922

GAF and Owens
Corning Certified
Installer

352-266-2927

Owner Name Loretha + Dave Wheeler Date of Proposal 11-21-24
Job Location 926 NE 5th City Ocala FL
Home Phone 629-3152 Work Phone _____ Email Lorwhe352 @ AOL

CONTRACT PROPOSAL

WE SUBMIT this estimate to:

Shingle Roofing Details: Remove 1 layers of roof. Clean out gutters and haul away all trash caused from tear off. Install new roof in the following manner:

Install 2 new layers of **synthetic underlayment**, nailed to deck. Install new drip edge: Yes / No, Color Galvalume
Galvanized , Aluminum _____. **Options Available** Skylights _____ Solar Attic Fans _____

Install new lead plumbing flashing: ~~Yes/No~~. Install new kitchen range vents: ~~Yes/No~~. Install dryer/bath vent: ~~Yes/No~~.

Install new aluminum ridge-vent: Yes / No, Color _____, Feet _____.

Upgrade to Cobra ridge vent: \$ _____ (Owner Initial) _____

Install new 30 year **Architectural Shingles** with 10 year Algae Resistance, 6- Nailed to Code. Color: N/A

Seal entire perimeter, all valleys, and all flashing with roof cement. Magnetized nail clean up.

Metal Roofing Details: 29^o Gauge Metal, Over shingles single layer YES NO , Over 1x4 Purlins YES NO , remove existing roof materials and dry in YES / NO. Color requested Galvalume, Owner Initials _____

Details: 4x CDX, Lifetime Screws - 26^o Trim

Product warranty provided by manufactures. Workmanship for roof installation only for 30 Days.

WE PROPOSE to furnish materials and labor as stated above for the sum of 18900 dollars _____ (Owners Initials)

Deposit \$ _____ Date _____ Check # _____ Contractor _____ Owner Initial _____ Balance \$ _____
Upgrade shingles to 30 year architectural, additional: \$ _____ (Owner Initial)

Payment to be due upon roof completion. Payment to be due in-full for all warranties to be valid. Warranties are not transferable.

This price is for the manufacturer indicated above. Change in manufacturers may result in a price increase.

This price is good for _____ days and is void hereafter at the option of the contractor. Access to the building is implied.

We will INSPECT for rotten wood and REPLACE wood at \$ 89 per 4' x 8' 1/2" plywood sheathing and \$ 10 per foot for fascia boards and rafters, and \$ 10 per foot for 1" decking EXTRA. All custom wood work will be charged at cost plus \$35.00 per man hour. Sign below and return white copy.

I have read and understand the above contract and conditions stated on the reverse side and agree to same.

Accepted (Owner) Loretha Wheeler

Date 11-21-24

Chuchian Roofing & Construction Inc.

Contractor

Page 1 of 2



THE DIFFERENCE IS THE PROMISE

1410 Emerson Street, Leesburg, FL 34748
Phone: 352-314-3625 · Fax: 352-240-3439 · CovenantRoofFL.com
State Roofing License: CCCI332763



Sales Contract

Covenant Roofing & Construction, Inc.® agrees to furnish all materials and labor necessary to do the modernization work at the following address:

Name: Loretta & David Wheeler Date: 11/18/2024
Address: 926 NE 5 City: Ocala State: FL Zip Code: 34470
Email: lorwhe352@aol.com Phone: Cell: 3526293152

In accordance with specifications given below:

RE- ROOF: METAL ROOF

- 1. REMOVE OLD ROOF TO WORKABLE SURFACE.
2. RE-NAIL ROOF DECK WITH RING SHANK NAILS.
3. REPLACE ANY ROTTED WOOD WITH STANDARD SHEATHING @ \$ 9 PER FOOT AND \$ 120 PER SHEET OF PLYWOOD, IF ANY.
4. INSTALL PEEL & STICK HI-TEMP UNDERLAYMENT OVER ENTIRE ROOF.
5. INSTALL FHA/VA EAVES DRIP. COLOR Galvalume
6. INSTALL NEW VALLEY METAL AND FLASHINGS AS NECESSARY.
7. INSTALL NEW COLOR MATCHED ACCESSORIES INCLUDING VENTS AND PLUMBING STACKS.
8. INSTALL METAL TYPE Exposed Fastener COLOR Galvalume
9. ANY FLASHING, SIDING OR STUCCO WORK WILL BE ADDITIONAL CHARGE TO HOMEOWNER IF ANY.
10. CLEAN UP JOB SITE OF ALL WORK DEBRIS AND HAUL AWAY ALL RELATED DEBRIS AND LEAVE JOB SITE CLEAN.
11. CONTRACTOR WILL COORDINATE REMOVAL AND RE-INSTALLATION OF ROOF RELATED PERIPHERALS SUCH AS (BUT NOT LIMITED TO) SOLAR UNITS, SKYLIGHTS, T.V. DISH AND AIR CONDITIONERS, ETC. REMOVE AND REINSTALL EXISTING SOFFIT AND FASCIA AT A TIME AND MATERIAL PRICE IN ADDITION TO CONTRACT PRICE, IF REQUIRED. THE COST FOR SUCH WORK WILL BE IN ADDITION TO CONTRACT PRICE AND HEREIN APPROVED BY HOMEOWNER.
12. ALL WORK COVERED BY A 5-YEAR WORKMANSHIP WARRANTY. CRC upgraded warranty
No work or warranty on sheds in yard

1. Work on the job described in the contract documents will commence on approximately ASAP and be completed on approximately ASAP. The recited dates are approximations and are subject to scheduling difficulties of Seller, labor and/or material shortages, acts of God and other events not foreseen by Seller. Seller reserves the right to employ any sub-contractor for the completion of the work described in the contract documents.

- 2. It is understood and agreed that the buyer hold harmless, Covenant Roofing & Construction, Inc.®, for any damages that may occur to the buyer's driveway(s) during delivery of materials and/or removal of the work related debris that may be required to perform this home improvement contract. Furthermore, the buyer herein gives permission for typical delivery vehicles and typical waste removal vehicles to enter said driveway(s) for the purpose of expediting this sales contract.
3. Covenant Roofing & Construction, Inc.® shall not be held responsible for damage to electrical lines, water lines, refrigerant lines or other mechanical components that have been improperly installed near roof decking and may be damaged while performing installation of roofing materials. Covenant Roofing & Construction, Inc.® shall not be responsible for any additional costs due to roof decking that may have old materials adhered in such a way that requires redecking of structure.
(Cont. on Page 2)

Table with contract pricing: Contract Price: \$20,638.00, Permit: \$200.00, Total: \$20,838.00, 1/3 Deposit: \$6,946.00, Subtotal: \$13,902.00, BALANCE DUE UPON COMPLETION: \$13,902.00

Executed in triplicate, one copy of which was delivered to, and receipt is hereby acknowledged by Buyer, this 18 day of Nov, 2024.

(Plus Total From Item 3 Above In Metal Re-Roof Specifications)

NOTICE TO OWNER

a. Do not sign this home improvement contract in blank. b. You are entitled to a copy of the contract at the time you sign. Keep it to protect your rights.
During a declared state of emergency, you, the residential property owner, may cancel this contract without penalty or obligation within 10 days after the execution of the contract or by official start date, whichever comes first, because this contract was entered into during a state of emergency by the Governor. The official start date is the date on which the work that includes the installation of materials that will be included in the final work on the roof commences, a final permit has been issued, or a temporary repair to the roof covering or roof system has been made in compliance with the Florida Building Code.

(Dealer-Seller) (Seal) (Purchaser Sign Here) (Seal)
By: (Salesman) (Purchaser Sign Here) (Seal)

Jimmy H. Cowan, Jr., CFA

Marion County Property Appraiser



501 SE 25th Avenue, Ocala, FL 34471 Telephone: (352) 368-8300 Fax: (352) 368-8336

2024 Property Record Card Real Estate

2831-104-000

[GOOGLE Street View](#)

Prime Key: 1265614

[MAP IT+](#)

Property Information

WHEELER LORETTA G
WHEELER DAVID
926 NE 5TH ST
OCALA FL 34470-5960

Taxes / Assessments: \$542.40
Map ID: 179
Millage: 1001 - OCALA

M.S.T.U.
PC: 01
Acres: .26

Situs: Situs: 926 NE 5TH ST OCALA

Current Value

Land Just Value	\$35,625		
Buildings	\$61,124		
Miscellaneous	\$1,627		
Total Just Value	\$98,376	Impact	
Total Assessed Value	\$40,283	<u>Ex Codes:</u> 01 38	(\$58,093)
Exemptions	(\$25,000)		
Total Taxable	\$15,283		

History of Assessed Values

Year	Land Just	Building	Misc Value	Mkt/Just	Assessed Val	Exemptions	Taxable Val
2024	\$35,625	\$61,124	\$1,627	\$98,376	\$40,283	\$25,000	\$15,283
2023	\$35,625	\$62,048	\$1,783	\$99,456	\$39,110	\$25,000	\$14,110
2022	\$37,500	\$55,467	\$1,705	\$94,672	\$37,971	\$25,000	\$12,971

Property Transfer History

Book/Page	Date	Instrument	Code	Q/U	V/I	Price
UNRE/INST	03/1993	76 MAR CER	0	U	I	\$100
1910/1276	03/1993	07 WARRANTY	2 V-SALES VERIFICATION	Q	I	\$35,000
1626/1166	12/1989	63 FAMILY	0	U	I	\$100
1582/1907	05/1989	71 DTH CER	0	U	I	\$100
1582/1883	05/1989	74 PROBATE	0	U	I	\$100

Property Description

SEC 17 TWP 15 RGE 22
PLAT BOOK B PAGE 253
WYOMINA TERRACE

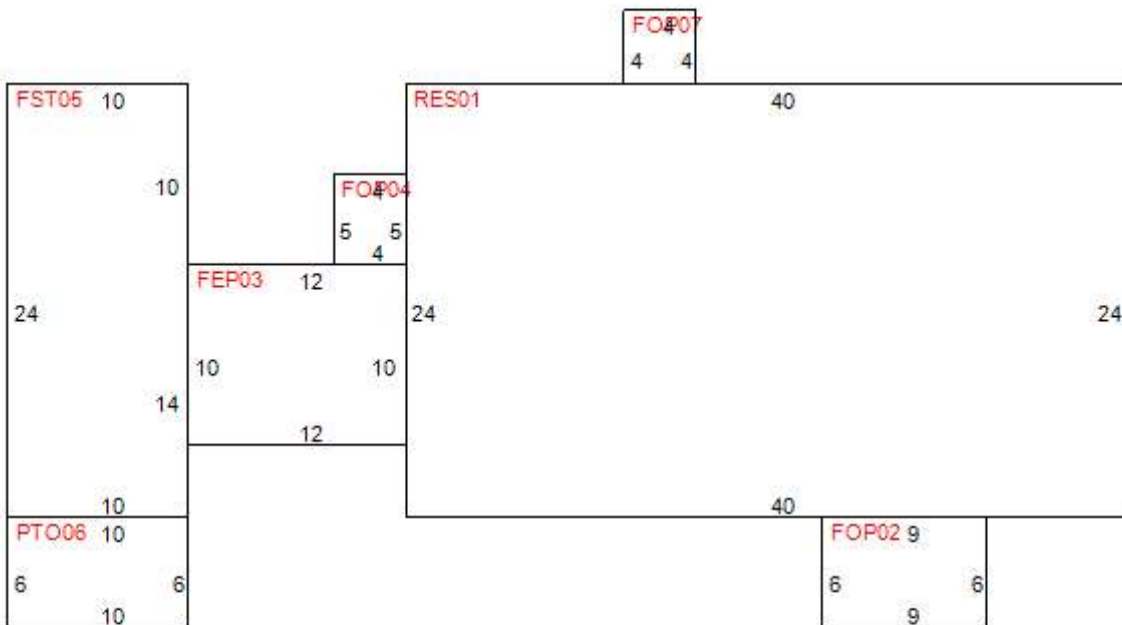
[Land Data - Warning: Verify Zoning](#)

Use	CUse	Front	Depth	Zoning	Units	Type	Rate	Loc	Shp	Phy	Class Value	Just Value
0100		75.0	150.0	R1A	75.00	FF	475.0000	1.00	1.00	1.00	35,625	35,625
Neighborhood 5144 - WYOMINA TER/CREST/PARK											Total Land - Class	\$35,625
Mkt: 8 70											Total Land - Just	\$35,625

[Traverse](#)

Building 1 of 1

RES01=L40U24R40D24.L8
 FOP02=D6L9U6R9.L32U14
 FEP03=L12D10R12U10.
 FOP04=U5L4D5R4.L12
 FST05=U10L10D24R10U14.D14
 PTO06=D6L10U6R10.U24R24
 FOP07=U4R4D4L4.



[Building Characteristics](#)

Improvement 1F - SFR- 01 FAMILY RESID
Effective Age 5 - 20-24 YRS
Condition 3
Quality Grade 400 - FAIR
Inspected on 6/15/2023 by 187

Year Built 1953
Physical Deterioration 0%
Obsolescence: Functional 0%
Obsolescence: Locational 0%
Architecture 0 - STANDARD SFR
Base Perimeter 128

Type	ID	Exterior Walls	Stories	Year Built	Finished Attic	Bsmt Area	Bsmt Finish	Ground Floor Area	Total Flr Area
RES	0110	- ASBESTOS SHNGL	1.00	1953	N	0 %	0 %	960	960
FOP	0201	- NO EXTERIOR	1.00	1953	N	0 %	0 %	54	54
FEP	0310	- ASBESTOS SHNGL	1.00	1953	N	0 %	0 %	120	120
FOP	0401	- NO EXTERIOR	1.00	1953	N	0 %	0 %	20	20
FST	0510	- ASBESTOS SHNGL	1.00	1953	N	0 %	0 %	240	240
PTO	0601	- NO EXTERIOR	1.00	1953	N	0 %	0 %	60	60
FOP	0701	- NO EXTERIOR	1.00	1953	N	0 %	0 %	16	16

Section: 1

Roof Style: 10 GABLE
Roof Cover: 08 FBRGLASS SHNGL
Heat Meth 1: 22 DUCTED FHA
Heat Meth 2: 00
Foundation: 7 BLK PERIMETER
A/C: Y

Floor Finish: 31 HARDWD ON JOST
Wall Finish: 20 PLASTER
Heat Fuel 1: 06 GAS
Heat Fuel 2: 00
Fireplaces: 0

Bedrooms: 2
4 Fixture Baths: 0
3 Fixture Baths: 1
2 Fixture Baths: 0
Extra Fixtures: 2

Blt-In Kitchen: Y
Dishwasher: N
Garbage Disposal: N
Garbage Compactor: N
Intercom: N
Vacuum: N

Miscellaneous Improvements

Type	Nbr Units	Type	Life	Year In	Grade	Length	Width
159 PAV CONCRETE	168.00	SF	20	1980	3	0.0	0.0
UDU UTILITY-UNFINS	192.00	SF	40	1953	1	12.0	16.0
UDC CARPORT-UNFIN	208.00	SF	40	1953	1	13.0	16.0
114 FENCE BOARD	184.00	LF	10	2000	4	0.0	0.0
045 LEAN TO	128.00	SF	15	2000	1	0.0	0.0
Total Value - \$1,627							

Appraiser Notes

Planning and Building
** Permit Search **

Permit Number	Date Issued	Date Completed	Description
OC00233	1/1/1995	-	RSRA CONCRETE

Cost Summary

Buildings R.C.N.	\$82,252	6/15/2023			
Total Depreciation	(\$26,322)				
Bldg - Just Value	\$55,930		Bldg Nbr	RCN	Depreciation
Misc - Just Value	\$1,627	3/11/2011	1	\$82,252	(\$26,322)
Land - Just Value	\$35,625	2/23/2024			
Total Just Value	\$93,182	.			Depreciated
					\$55,930