

Updated 17Jul23

HERITAGE GREENS COMMUNITY ASSOCIATION Architectural Review Form

STEP 1 -- Homeowner to fill in. Your neighborhood: (click one)

| | | | |
|-----------------------|------------------|------------------|------------------------------------|
| Single Family Homes | Crestview Villas | Crestview Condos | Heritage Greens Master Association |
| Colonial Links Villas | Club Homes I | Club Homes II | |
| Colonial Links Condos | Club Homes III | Club Homes IV | |

Homeowner name: _____ Property address: _____

Telephone: _____ E-mail: _____

Contractor name: _____

Work to be done: _____

Homeowner signature: _____ Date submitted: _____

PLEASE PRINT & SUBMIT WITH ALL REQUIRED DOCUMENTATION. SEE APPENDICES A & B

STEP 2 -- Neighborhood association to review

ARB: (___ Approved) (___ Denied) Date _____ Signature _____

Board: (___ Approved) (___ Denied) Date _____ Signature _____

All required supporting documentation received and attached? (___ Yes) (___ No)

STEP 3 -- HGCA Property management to log

Initials _____ Date _____

Sent to HGCA ARB committee secretary for review _____ Date _____

STEP 4 -- Master association to review

ARB: (___ Approved) (___ Conditional) (___ Denied) Date _____ Signature _____

Board: (___ Approved) (___ Conditional) (___ Denied) Date _____ Signature _____

Reason(s) for conditional or denial: _____

STEP 5 --Final approval

Neighborhood association approver OR Property manager _____ Date _____

HERITAGE GREENS COMMUNITY ASSOCIATION

ARCHITECTURAL REVIEW FORM GUIDELINES

Updated March 2025

Architectural Review Application Flow (when homeowner is initiating the work)

- ▶ Homeowner gets AR application (PDF format from community website or hardcopy from Community Center) and works with contractor to supply detail and supporting documentation (according to **Appendix B**)
- ▶ Homeowner submits AR application and supporting documentation to Neighborhood Association AR approver(s) and Neighborhood Association Property Manager (see **Appendix A**).
- ▶ Neighborhood Association AR approver or Property Manager works with homeowner if application or supporting documentation is incomplete.
- ▶ There are two levels of approval needed before your application is considered approved and you may commence work – your Neighborhood and the Master ARB Committee. Here are the steps:
 - Once an AR application is complete, Neighborhood Association AR approver signs and dates approval and passes on to Neighborhood Association President.
 - Note: if an application is denied at Neighborhood Association level the application goes back to the homeowner with reasons for denial.
 - Neighborhood Association President signs and dates approval. President, AR approver or Neighborhood manager will then pass on to Community Association Property Manager (CAM).

ARB Application General Guidelines

An Architectural Review (AR) application must be filled out whenever a material or physical change is made to any aspects of the appearance or aesthetics of the **EXTERIOR** of your property or structure. (A description of which changes require an ARB is contained within the DRG document found on the community Web site). Missing paperwork may delay the process, so it is important to attach all required documents to obtain approval.

1. The ARB Application form, with attached instructions, can be found online at our community website (<https://heritagegreensmaster.com>) under Forms) or in hard copy at the Community Center in the hallway near the fitness center. *If the homeowner has questions or concerns, or needs guidance in completing their AR application, please contact your Neighborhood Association property manager or AR approver to receive instructions (see **Appendix A** to determine contact for your Association.)*
2. Homeowners must fill out the application including all necessary information in the Homeowner Section. Send the completed form, together with scanned copies of all required supporting documentation (see attached **Appendix B**) to the Neighborhood Association AR approver(s) and Neighborhood Association Property Manager.
 - It is the responsibility of the Neighborhood Property Manager or Neighborhood AR approver(s) to assist the homeowner and review your application and supporting documentation for completeness. Once the Neighborhood Property Manager or AR approver has determined the application has the proper supporting documentation, they will either approve or deny the application (signed and dated). If denied by the neighborhood association approvers or President, the application will be returned to the homeowner with denial reason(s) stated.
3. If approved, the complete application will be forwarded to the HGCAI Property Manager for review.
 - Once the HGCAI Property Manager (CAM) has logged and reviewed the AR application, they will sign and date the application and send the entire packet to the HGCAI ARB Committee.
4. AR applications are valid for 1 year from the date of approval. All approved work started by the contractor must be completed within 90 days unless the ARB is notified of subcontractor delays.

GLOSSARY OF TERMS

- ARB – Architectural Review Board
- CAM – Community Association Manager
- CDD – Community Development District (<https://www.heritagegreenscdd.com>)
- DRG – Design Review Guidelines
(<https://heritagegreensmaster.com/docs/HGCA%20DRG%20Official%20and%20Recorded%209-10-19.pdf>)
- HGCAI – Heritage Greens Community Association INC. (<https://heritagegreensmaster.com/index.htm>)
- NA – Neighborhood Association

APPENDIX A: Presidents, AR Approvers, and Property Managers by Association

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|------------------------|--|
| Single Family Homes: | John Shelton (johnshelton4948@gmail.com), President David Sutton (david.sutton@gceiwm.com) AR Approver Linda Dye (dyels624@gmail.com), AR approver Sally Davison (sallydavison13@gmail.com), AR approver Resort Management Jill Galloway (jgalloway@resortgroupinc.com) |
| Crestview Villas: | Robert Topoleski (rtopoleski@gmail.com) President Debbi Joos (debbijoos@gmail.com), AR approver Sandcastle Rebecca O'Brien (rebecca@sandcastlecm.com) |
| Crestview Condos: | Dan Anderson (dja354@outlook.com) President, AR approver Resort Management Rob Holm (rholm@resortgroupinc.com) |
| Colonial Links Villas: | Bill O'Reily- President, AR Approver Resort Management Melanie McBride (mmcbride@resortgroupinc.com) |
| Colonial Links Condos: | Beatrix Stillwell (beatrix_b2@yahoo.com), President, AR approver Resort Management Melanie McBride (mmcbride@resortgroupinc.com) |
| Club Homes I: | Michael Johnson (mdsamash@gmail.com), President Dale Meszaros (dmesz15@hotmail.com), AR approver Sandcastle Rhonda Prosser (RhondaP@sandcastlecm.com) |
| Club Homes II: | Christina Geiser (chriselise19@yahoo.com) President, AR approver Newell Georgiana Highley (Georgiana@newellpropertymanagement.com) |
| Club Homes III: | Toni Malone (temptationmom@aol.com) President, AR approver Sandcastle Rhonda Prosser (RhondaP@sandcastlecm.com) |
| Club Homes IV: | John Bowen (jrbowench4@gmail.com) President, AR approver Sandcastle Rhonda Prosser (RhondaP@sandcastlecm.com) |
| Master Association: | Chris Swanger (cswanger@hotmail.com) President Sally Davison (sallydavison13@gmail.com), AR approver Resort Management Garret Alvarez (galvarez@resortgroupinc.com) |

APPENDIX B: ARB Application Guidelines

▶▶▶ NO WORK REQUIRING AN ARB APPROVAL MAY COMMENCE UNTIL THE ARB IS FULLY APPROVED BY THE MASTER ARB COMMITTEE. ◀◀◀

▶▶▶ Homeowner is responsible for asking and knowing when a permit is needed for any exterior work to be done, even if the work is to be done by the homeowner themselves. ◀◀◀

If you are requesting roof replacement:

- ▶ Roof color must be in the grey, brown, or terracotta family, flat or scalloped tile or shingle (color palette on display in Community Center hallway near gym).
- ▶ ARB application must reference roof tile company, color, and style (color picture from a contractor catalogue is acceptable).
- ▶ Supporting documentation must include:
 - Contractor license.
 - Contractor proof of insurance (liability insurance must be included and homeowner name and address listed in the Certificate Holder box, or Association name if a Board sponsored project).
 - Statement of Work including materials used.
 - Gutters to be installed (if yes see gutter section below).
- ▶ All license and insurance documents must have current dates; no expired dates will be accepted.

If you are requesting gutter replacement or new gutters:

- ▶ Newly installed gutters, or current gutters being replaced, have a color palette requirement too. Gutter may only be:
 - White, or
 - A color that is closely matched to the approved roof color palette choices of the Community Association Board.
- ▶ The color of gutters must be uniform for the entire house (no mixing of gutter colors).
- ▶ Replacement of existing gutters with the same color does not require an ARB.

If you are requesting house exterior painting:

- ▶ Refer to color palette at the Community Center; color of exterior is driven by the color of the current roof.
- ▶ ARB application must reference contractor name, exterior of house to be painted.
- ▶ Attach one copy of a Paint Application sheet indicating the exterior paint color choice and trim color. The garage door or front door is to be painted also, reference that as well.
 - When changing the exterior paint colors (house and trim) it is also recommended the garage door and entry door be painted to fit within the color palette suggested on the color palette at the Community Center.
- ▶ Supporting documentation must include:
 - Contractor license.
 - Contractor proof of insurance (liability insurance must be included and homeowner name and address listed in the Certificate Holder box).
 - Statement of work including materials to be used and scope of all that will be painted.
- ▶ All license and insurance documents must have current dates; no expired dates will be accepted.

If you are requesting landscape enhancements:

- ▶ ARB application must reference work to be done including plant or shrub types.
- ▶ A plot diagram, including location of the residence, showing where the landscaping is to be done on the property must be provided.
- ▶ ARB application must reference landscape vendors, scope of the landscaping to be done.
- ▶ Supporting documentation must include:
 - Contractor license.
 - Contractor proof of insurance (liability insurance must be included and homeowner name and address listed in the Certificate Holder box).
 - Statement of work including materials to be installed and scope of all landscape changes.
- ▶ All license and insurance documents must have current dates; no expired dates will be accepted.
- ▶ Grass may not be removed to install other landscape enhancements. You must conform to the original lawn footprint. Grass or lawn may not be replaced by stone outside of a flowerbed as mulch.

If you are requesting tree removal:

- ▶ ARB application must reference the vendor's name and which tree(s) are to be removed.
 - There are Collier County requirements to be met regarding tree removal replacement. Please contact Mark Templeton at Collier County Growth Management Department ((239) 252-2400) or visit their Web site (<https://www.colliercountyfl.gov/home/showdocument?id=82938>).
 - It is the homeowner's responsibility to contact the county and work with Growth Management to determine whether a tree removed must be replaced with another tree, and if so, what type and size of tree is acceptable. Failure to do so may result in a fine from the county and from the Community Association.
 - The application must indicate whether the tree(s) removed will be replaced or sodded over.
 - Stump grinding must be done unless the tree is removed within a populated flowerbed, and the stump will not be visible from the street.
 - Tree replacement must occur within 30 days of removal.
- ▶ A plot diagram, including location of residence, showing what tree(s) are to be removed, and showing location of remaining trees on property, must be provided.
 - A site visit may take place by the neighborhood Property Manager and/or Board to validate the remaining trees on the property.
 - Any tree located within the Community Development District (CDD) right of way (sixteen feet in from the curb) will require written approval from the CDD to remove. Contact Neil at Dorrell Management Group (neil@dmgfl.com) to obtain approval.
- ▶ Supporting documentation must include:
 - Contractor license.
 - Contractor proof of insurance (liability insurance must be included and homeowner name and address listed in the Certificate Holder box).
 - Statement of work including materials to be removed/installed and scope of all landscape changes.
- ▶ All license and insurance documents must have current dates; no expired dates will be accepted.

If you are requesting to add or expand a lanai:

- ▶ ARB application must reference the contractor's name and scope of work to be done.
- ▶ Detailed architectural drawing of changes on a plot diagram of property, relative to existing structure.
- ▶ County Permit required at homeowner's expense.
- ▶ Supporting documentation must include:
 - Contractor license.
 - Contractor proof of insurance (liability insurance must be included and homeowner name and address listed in the Certificate Holder box).

- Statement of work including materials to be installed and scope of all changes.
- ▶ All license and insurance documents must have current dates; no expired dates will be accepted.

If you are requesting a pool screen or cage:

- ▶ ARB application must reference contractor name, scope of work to be done including materials, color (white frame with grey/black screening), hard cover or screened cover, any planned extension of lanai footprint must be supported by scope of work and an explanation of increased size.
- ▶ A plot diagram, including location of the residence, showing where the screen cage is to be done on the property must be provided.
- ▶ In cases where a lanai extension is requested, the homeowner must obtain a county permit at homeowner's expense.
- ▶ Supporting documentation must include:
 - Contractor license.
 - Contractor proof of insurance (liability insurance must be included and homeowner name and address listed in the Certificate Holder box);
 - Statement of work including materials to be installed and scope of all changes.
- ▶ All license and insurance documents must have current dates; no expired dates will be accepted.

If you are requesting hurricane shutters:

- ▶ ARB application must reference contractor name, scope of work to be done including materials and color (according to HGCA DRG).
- ▶ A color picture from a contractor catalog is acceptable.
- ▶ A plot diagram, including location of the residence, showing where the shutter(s) are to be placed on the residence must be provided.
- ▶ Supporting documentation must include:
 - Contractor license.
 - Contractor proof of insurance (liability insurance must be included and homeowner name and address listed in the Certificate Holder box);
 - Statement of work including materials to be installed and scope of all changes.
- ▶ All license and insurance documents must have current dates; no expired dates will be accepted.

If you are requesting driveway changes:

- ▶ ARB application must reference contractor name, scope of work to be done including materials and color.
 - If you are painting your driveway, according to HGCA color palette driveway color is driven by current roof color.
 - Proof of material type and color must be provided along with the ARB application (color picture from a contractor catalogue is acceptable).
- ▶ A plot diagram, including location of the residence, showing where the driveway is located relative to the residence must be provided.
 - Any request to expand the driveway or redesign driveway must follow the HGCA DRG to be approved.
- ▶ Supporting documentation must include:
 - Contractor license.
 - Contractor proof of insurance (liability insurance must be included and homeowner name and address listed in the Certificate Holder box);
 - Statement of work including materials to be installed and scope of all changes.
- ▶ All license and insurance documents must have current dates; no expired dates will be accepted.