



CITY COUNCIL AGENDA

July 30, 2018, NOON

WORKSHOP

CITY COUNCIL CHAMBERS, CITY HALL
 29592 ELLENSBURG AVE
 GOLD BEACH OR 97444

JOINT WORKSHOP WITH CURRY COUNTY FAIR BOARD

Call to order: Time: _____

- 1. **The pledge of allegiance**
- 2. **Roll Call:**

	Present	Absent
Mayor Karl Popoff		
Council Position #1 Melinda McVey		
Council Position #2 Larry Brennan		
Council Position #3 Becky Campbell		
Council Position #4 Doug Brand		
Council Position #5 Tamie Kaufman		
City Administrator Jodi Fritts		
Student Liaison Ashlee Wood		

- 3. **Special Orders of Business:**
 None Scheduled
- 4. **Consent Calendar:**
 None Scheduled
- 5. **Citizens Comments**
 As presented to the Mayor at the beginning of the meeting
- 6. **Public Hearing**
 None Scheduled
- 7. **Citizen Requested Agenda Items**
 None Scheduled
- 8. **Public Contracts and Purchasing**
 None Scheduled
- 9. **Ordinances & Resolutions**
 None Scheduled

10. Miscellaneous Items (including policy discussions and determinations)
DISCUSSION REGARDING USE OF 1% ROOM TAX FOR FAIRGROUNDS/ECOB MAINTENANCE

The City of Gold Beach is dedicated to enhancing quality of life, while promoting health, safety, and welfare of our citizens, businesses, and visitors in the most fiscally responsible manner. In doing this, the City will respect the past, respond to current concerns, and plan for the future, while maintaining environmental sensitivity in our beach oriented community

11. City Administrator's Report
Presented at the July 9th regular meeting

12. Mayor and Council Member Comments
a. Mayor Karl Popoff
b. Councilors
 1) Melinda McVey
 2) Larry Brennan
 3) Becky Campbell
 4) Doug Brand
 5) Tamie Kaufman
c. Student Liaison, Ashlee Wood

13. Citizens Comments
As permitted by the Mayor

14. Executive Session
None Scheduled

The next regularly scheduled City Council meeting is **Monday, August 13th, at 6:30PM** in the Council Chambers of City Hall, 29592 Ellensburg Avenue, Gold Beach, Oregon.

15. Adjourn Time: _____

The City of Gold Beach is dedicated to enhancing quality of life, while promoting health, safety, and welfare of our citizens, businesses, and visitors in the most fiscally responsible manner. In doing this, the City will respect the past, respond to current concerns, and plan for the future, while maintaining environmental sensitivity in our beach oriented community



MISC ITEMS (including policy discussions & determinations)

GOLD BEACH CITY COUNCIL AGENDA REPORT

Agenda Item No. **10. a.**

Council WORKSHOP Meeting Date: July 30, 2018

**TITLE: Joint Workshop with Fair Board regarding use of 1% tax for
Fairgrounds/ECOB building maintenance**

SUMMARY AND BACKGROUND:

For the joint work session, the following reference info is provided:

- Copy of R1718-07, the resolution adopting policies related to use of the funds
- Copy of the May 2017 Council report related to developing the policies
- Sample forms for inspection of buildings

RESOLUTION R1718-07

A RESOLUTION DEFINING THE COUNCIL POLICIES REGARDING THE USE AND DISTRIBUTION OF THE EVENT CENTER ON THE BEACH (CURRY COUNTY FAIRGROUNDS) 1% TRANSIENT ROOM TAX AND APPOINTING COUNCIL LIAISONS TO THE FAIR BOARD

WHEREAS, the City enacted a transient room tax ordinance in 1982 and the room tax for transient lodgers was set at 6%; and

WHEREAS, because Gold Beach is the county seat of Curry County, the City Council believes that strong intergovernmental partnerships create a healthy and robust community; and

WHEREAS, the City Council recognizes the value of the Event Center within the City limits and that Curry County is not in a financial position to maintain all of the Event Center capital needs; and

WHEREAS, in June of 2016 the Council enacted Ordinance No. 658 which amended the Transient Room Tax and Community Promotion Code to require lodging operators to collect an additional 1% transient room tax for the express purpose of assisting with maintenance at the fairgrounds specifically amending

Section 4.270 Purpose of and Distribution Formula for Transient Room Tax Receipts

To read :

(1) Each operator liable for collection and remittance of the Transient Room Tax as imposed by this code, shall withhold five percent (5%) of the net 7% tax collected to cover the operator’s expense in collection and remittance of said tax.

(2) Pursuant to Ordinance 369, the “Community Advertising and Promotion Fund” was created which is separate and apart from other special and general funds. Seventy-five (75%) percent of 6% of the net 7% collected shall be deposited into this fund. The remaining twenty (20%) percent of 6% of the net 7% collected shall be deposited into the General Fund.

(3) There is hereby created a special fund which shall be known as the “Event Center/Fairgrounds Building Maintenance Fund” which shall be controlled and administered by the City of Gold Beach. Ninety-five (95%) of 1% of the net 7% collected shall be deposited into this fund.

The revenue disbursement formula net 7% tax collected is as follows:

7% TAX COLLECTED	OPERATOR	PROMOTIONS FUND	GENERAL FUND	EVENT CENTER BUILDING MTC FUND	TOTAL
Original 6%	5%	75%	20%	0%	100%
2016 1%	5%	0%	0%	95%	100%

WHEREAS, after adopting the ordinance amendment, the Council discussed the need to adopt a formal policy on the process for the use and distribution of the room tax maintenance funds collected. After several public discussions at regularly scheduled Council meetings in 2016 and 2017, the Council adopted the following policies at the May 2017 meeting:

- 1) Expenditures from the ECOB 1% Fund will be made by the City Council rather than the Tax Administrator (City Administrator); and
- 2) The Council will request that the Fair Board present to the City a fairgrounds Capital Improvement Plan and identify which projects they feel are of greatest need; and
- 3) The expenditure decisions will be announced publicly in a simple ceremony between the two agencies for public information purposes; and
- 4) The policies that the Council determined will be formally adopted as a resolution that can be reviewed and amended from time to time; and
- 5) The Mayor will appoint two (2) sitting Councilors to be liaisons between the City Council and the Fair Board.

WHEREAS, after approving the motion to formalize the Council policies, the Mayor appointed Councilor Becky Campbell, and Councilor Doug Brand to serve as Council liaisons to the Fair Board until further notice.

THEREFORE BE IT RESOLVED the City Council of the City of Gold Beach, Oregon, hereby formally adopts the above policies, and Council liaison positions, effective immediately and to remain in effective until otherwise amended by resolution.

PASSED BY THE CITY COUNCIL OF THE CITY OF GOLD BEACH, COUNTY OF CURRY, STATE OF OREGON, AND EFFECTIVE THIS 14th DAY OF AUGUST, 2017.


Karl Popoff, Mayor

ATTEST:


Jodi Fritts, City Administrator/City Recorder



SECTION 10.

MISC ITEMS (including policy discussions & determinations)

GOLD BEACH CITY COUNCIL AGENDA REPORT

Agenda Item No. **10 a.**

Council Meeting Date: May 6, 2017

TITLE: Discussion of Preparing ECOB 1% Tax Expenditure Policies

SUMMARY AND BACKGROUND:

Last July the Council amended the Room Tax Ordinance to begin collecting an additional 1% to fund maintenance projects at the Event Center on the Beach (Fairgrounds). At the time we discussed the need to adopt policies related to how the expenditures would be reviewed and approved. To date we haven't adopting anything formal. I have put together the following info to assist the Council in preparing policies.

REQUESTED ACTION

Please review and discuss. Staff can prepare the policies for adoption in June if the Council wishes.

Staff would recommend that the Council adopt policies related to the review and funding of expenditures from the 1% Event Center Building Maintenance Fund prior to the disbursement of any funds. A detailed (but not lengthy!) Capital Improvement/Maintenance plan should be prepared and adopted as the basis for funding projects. This will provide a framework for both the City and Fairgrounds on what and how the money can be used.

These are policies, not ordinances, so the Council has the ability to efficiently and quickly revise and update the spending structure as needs change. I would recommend that two City Councilors and two Fair Board members serve as a project review committee prior to any expenditures. The City Administrator and Fairground/Event Center Manager can serve to implement the committee's approved plans.

Because the fairgrounds have so many diverse building types, both in purpose and age, a detailed inventory should be made of each structure. These inventory sheets can be utilized to prioritize and triage maintenance. I have attached a sample of form that can be altered to be used for an inventory sheet for each building.



SECTION 10.

MISC ITEMS (including policy discussions & determinations)

Other information for the policy preparation:

How the IRS identifies Capital improvements VS Maintenance/Repair expenses

Capital	Repair
Improvements that "put" property in a better operating condition	Improvements that "keep" property in efficient operating condition
Restores the property to a "like new" condition	Restores the property to its previous condition
Addition of new or replacement components or material sub-components to property	Protects the underlying property through routine maintenance
Addition of upgrades or modifications to property	Incidental Repair to property
Enhances the value of the property in the nature of a betterment	
Extends the useful life of the property	
Improves the efficiency of the property	
Improves the quality of the property	
Increases the strength of the property	
Increases the capacity of the property	
Ameliorates a material condition or defec	
Adapts the property to a new use	
Plan of Rehabilitation Doctrine	

I'm also attaching at the end of this report a copy of the City of Corvallis financial policies related to capital improvement projects. It's not real long and has some good language in it.

BEST PRACTICE FOR CAPITAL PLANNING POLICIES from the Government Finance Officers Association <http://gfoa.org/capital-planning-policies>

We don't necessarily need to get as detailed as this indicates because the facilities are not ours—we are just assisting, but we do need to have some general guidelines on how the City is willing to help and what may/may not be considered for funding. For example: the City will fund maintenance to existing facilities, but not the building of new structures or facilities, or the



SECTION 10.

MISC ITEMS (including policy discussions & determinations)

City will fund project costs but not consultant costs. *(And these are not specific suggestions-- just sample talking points on how to structure the guidelines)*

BACKGROUND:

Policies designed to guide capital planning help to assure that each jurisdiction's unique needs are fully considered in the capital planning process. Effective policies can also help a government to assure the sustainability of its infrastructure by establishing a process for addressing maintenance, replacement, and proper fixed asset accounting over the full life of capital assets. In addition, capital planning policies can strengthen a government's borrowing position by demonstrating sound fiscal management and showing the jurisdiction's commitment to maximizing benefit to the public within its resource constraints.

Good capital planning policies can lead to the development of a capital plan that is consistent with best practices; however, they do not constitute the capital plan itself. Rather, capital planning policies establish a framework in which stakeholders understand their roles, responsibilities, and expectations for the process and an end result. Ideally, such policies also include guidelines for coordinating capital projects and promoting sound, long-term operational and capital financing strategies.

To create a sustainable capital plan, the finance officer and other participants in the capital planning process need to consider all capital needs as a whole, assess fiscal capacity, plan for debt issuance, and understand impact on reserves and operating budgets, all within a given planning timeframe. Capital planning policies provide an essential framework for managing these tasks and for assuring that capital plans are consistent with overall organizational goals.

RECOMMENDATION:

GFOA recommends that governments develop and adopt capital planning policies that take into account their unique organizational characteristics including the services they provide, how they are structured, and their external environment.

Capital planning policies should provide, at minimum: **(highlighting by staff)**

- 1. A description of how an organization will approach capital planning, including how stakeholder departments will collaborate to prepare a plan that best meets the operational and financial needs of the organization.**
- 2. A clear definition of what constitutes a capital improvement project.**
- 3. Establishment of a capital improvement program review committee and identification of members (for example, the finance officer or budget officer, representatives from planning, engineering, and project management, and, as deemed appropriate, operations departments most affected by capital plans, along with a description of the responsibilities of the committee and its members.**



SECTION 10.

MISC ITEMS (including policy discussions & determinations)

4. A description of the role of the public and other external stakeholders in the process. (The level and type of public participation should be consistent with community expectations and past experiences.)
- 5. Identification of how decisions will be made in the capital planning process including a structured process for prioritizing need and allocating limited resources**
6. A requirement that the planning process includes an assessment of the government's fiscal capacity so that the final capital plan is based on what can realistically be funded by the government rather than being simply a wish list of unfunded needs.
7. A procedure for accumulating necessary capital reserves for both new and replacement purchases.
8. A policy for linking funding strategies with useful life of the asset including identifying when debt can be issued and any restrictions on the length of debt.
9. A requirement that a multi-year capital improvement plan be developed and that it include long term financing considerations and strategies.
10. A process for funding to ensure that capital project funding is consistent with legal requirements regarding full funding, multi-year funding, or phased approaches to funding.
- 11. A requirement that the plan include significant capital maintenance projects.**
12. Provisions for monitoring and oversight of the CIP program, including reporting requirements and how to handle changes and amendments to the plan.



City of Corvallis

Financial Policies - Council Policy

Policy # 10.05

Financial Policies – Capital Improvement Program (CIP)



Purpose:

To maintain the City's investment in infrastructure, this policy provides direction for the development and implementation of the annual CIP.

Scope:

The City has a significant investment in the infrastructure necessary for the general public's use. The infrastructure systems – streets, bikeways and sidewalks, water treatment plants and distribution system, wastewater treatment plants and collection system, storm water conveyance system, airport, parks, recreation facilities, open spaces, and municipal facilities – are important to the general well-being of the community. The City maintains and enhances the infrastructure systems by developing long-term plans to meet the service needs of the community and by securing the funding necessary to implement the plans. The CIP is developed to advise the community of the projects proposed over a five-year period to protect the public investment.

Guidelines:

CAPITAL IMPROVEMENT PROGRAM

- A. Definition of a Capital Project -- A capital project must:
 1. cost more than \$25,000, and
 2. be a permanent addition to the capital assets of the City, and
 3. purchase land, or
 4. construct a new building, or
 5. remodel or add to an existing building, or
 6. construct/install public infrastructure, or
 7. replace existing infrastructure.
- B. Full Costs Included -- For any project which meets the definition of a capital project, all costs for the project, including design, land or right-of-way acquisition, appraisals, construction, construction management, furnishings, and legal or administrative costs will be included in the project budget.
- C. Five-year CIP -- A five-year Capital Improvement Program (CIP) shall be developed annually by staff. The plan will be presented to and reviewed by the Planning Commission for compliance with the Comprehensive Plan, reviewed by the Budget Commission for compliance with long-term financial plans, and approved by the City Council. This plan shall contain the planned capital improvements from all funds and departments of the City.
- D. Existing Assets -- A high priority shall be placed on repair or replacement of capital assets when such assets have deteriorated to the point of becoming hazardous, incur high maintenance costs, are negatively affecting property values, and/or are no longer functionally serving their intended purposes.
- E. Construction Standards -- Capital improvements constructed in the city shall be designed and built based on published construction standards which shall be periodically updated by the City Engineer. The construction standards will assure projects are built with an acceptable useful life and minimum maintenance costs.



City of Corvallis

Financial Policies - Council Policy

Policy # 10.05

Financial Policies – Capital Improvement Program (CIP)



CAPITAL IMPROVEMENT MAINTENANCE

Operating Budget Impacts -- Future operating budget impacts for maintenance of new capital facilities will be analyzed and estimates included in all years of the financial plans as part of considering a proposed capital project.

CAPITAL IMPROVEMENT FINANCING

- A. Appropriate Funding -- Within the limitation of existing law, various funding sources may be used for capital improvements. When capital projects are proposed, funding sources will be identified.
- B. Unspent Funds -- Upon completion of capital projects, the Finance Director shall certify any unspent funds from the project. The most restrictive project revenues shall be used first so that unused funds will have the fewest restrictions on future use. Unspent capital project funds, except bond funds, shall be returned to their original source. If there are unspent funds from a bond issue, those monies will be allocated according to stipulations in the bond indenture. In no case shall projects incur a funding deficit without the express approval of the City Council.
- C. Interest Earnings in the Capital Construction Fund (governmental fund) -- Interest earnings shall be allocated to each project based on the project's proportion of the cash balance in the fund. Projects which have a negative cash balance due to timing of reimbursements of grants or loans will not accrue interest revenue or an interest expense.
 1. Interest earnings which are restricted due to the funding source (i.e., grant, bond issue) shall be spent in compliance with those restrictions.
 2. Interest earnings not otherwise limited will be considered the most restricted City funds in the project and will be spent first in compliance with section B on Unspent Funds.
- D. Interest Earnings in the Proprietary Fund Construction Components -- Interest earnings which are restricted due to the funding source (i.e., grant, bond issue) shall be spent in compliance with those restrictions. All non-restricted interest earnings will be accrued to the operating fund and will be available to spend on either operations or future capital projects.

Review/Update:

The Finance Director will prepare this Council Policy review every year for City Council approval.



City of Corvallis

Financial Policies - Council Policy

Policy # 10.05

Financial Policies – Capital Improvement Program (CIP)



Rev #	Name	Change Date	Character of Change
0		November 1989	Adopted
23	N. Brewer	February 2012	Review
24	N. Brewer	March 2013	Review
25	N. Brewer	April 2014	Review
26	J. Chenard	March 2015	Review
27	J. Chenard	June 2015	Review
28	N. Brewer	October 2016	Update to clarify language

Building Assessment form

Component	Condition assessment - either		Cost (\$000) ¹
	OK ✓	What needs to be done and why? (ie current materials, their condition and whether repair or replacement is required)	
Site Conditions			
Accessibility requirements			
Base/Foundations			
Floor			
Cladding			
Windows			
Doors			
Roof			
Ceilings			
Linings			
Floor coverings			
Lighting			
Electrical			
Plumbing			
Mechanical			
Fire protection			
Interior painting			
Exterior painting			
Other			

Total cost estimate			

General observations:

This condition assessment has been undertaken by (name of consultant and sign-off):

The cost estimates have been prepared by (name of consultant and sign-off):

¹ Including all fees eg consultants' fees.

BUILDING INSPECTION CHECKLIST

San Juan NF

Unit _____

Building Description _____

Inspector _____

Building ID# _____

Building Location _____

Date _____

10100 SITE WORK

		Good Condition generally okay - minor work may be needed	Fair Major work needed to correct deficiencies	Poor Replacement needed - generally not capable of repair	Comment
Item	Subdivision				
1	Backfill				
2	Surface drainage				
3	Manholes				
4	Ditches adjacent to building				
5	Trees and vegetation on site, including hazard trees				
6	General site maintenance				
7	Parking area if applicable				
8	Fences				
9	Poles				
10	Railings				
11	Building Accessibility (From Parking area to building.)				
12	Pathway & Sidewalks (width and ADA)				
13	Curbs				
14	Other items (list)				
15	Signs				
16	Stairs/Steps				
17					
18					
19					

Note items to correct on attached sheets. Also note other comments and any emergency repairs needed.

BUILDING INSPECTION CHECKLIST

San Juan NF

Unit _____

Building Description _____

Inspector _____

Building ID# _____

Building Location _____

Date _____

20200 ARCHITECTURAL WORK

20200 ARCHITECTURAL WORK		Good Condition generally okay - minor work may be needed	Fair Major work needed to correct deficiencies	Poor Replacement needed - generally not capable of repair	Comment
Item	Subdivision				
1	Foundation				
2	Walkways				
3	Exterior slab				
4	Interior slab				
5	Walls				
6	Crawl Space				
7	Siding				
8	Roof				
9	Columns/Supports				
10	Interior walls				
11	Window casing				
12	Window (glass, screen)				
13	Door hardware				
14	Door jam				
15	Doors				
16	Sidelights				
17	Interior wall finish				
18	Porches and covered walkways				
19	Exterior wall finishes				
20	Insulation				
21	Roofing				
22	Fascia				
23	Flashing				
24	Roof drainage				
25	Partitions and interior doors				
26	Tile and/or floor finishes				
27	Masonry (stone, brick)				
28	Ceiling				
29	Vents				

BUILDING INSPECTION CHECKLIST

San Juan NF

Unit _____ Building Description _____ Inspector _____

Building ID# _____ Building Location _____ Date _____

30	Skylights				
31	Basement for composting unit				
32	Stairs/Ladders/Handrails				
33	Attic access				
34	Signs				
35	Other items (list)				
36					
37					
38					
39					
40					
41					

Note items to correct on attached sheets. Also note other comments and any emergency repairs needed.

BUILDING INSPECTION CHECKLIST

San Juan NF

Unit _____ Building Description _____

Inspector _____

Building ID# _____

Building Location _____

Date _____

31500 MECHANICAL WORK

		Good Condition generally okay - minor work may be needed	Fair Major work needed to correct deficiencies	Poor Replacement needed - generally not capable of repair	Comment
Item	Subdivision				
1	Water supply				
2	Faucets				
3	Sinks				
4	Fixtures (Note type)				
5	Toilet Stool				
6	Hangers				
7	Composting Unit				
8	Vault (crack, leaks, capacity & material)				Note dimensions and material type
9	SST Standards				
10	Toilet paper dispenser				
11	Floor drains				
12	Other items (list)				
13					
14					
15					
16					
17					

Note Items to correct on attached sheets. Also note other comments and any emergency repairs needed.

BUILDING INSPECTION CHECKLIST

San Juan NF

Unit _____ Building Description _____

Inspector _____

Building ID# _____ Building Location _____

Date _____

41600 ELECTRICAL WORK

		Good Condition generally okay - minor work may be needed	Fair Major work needed to correct deficiencies	Poor Replacement needed - generally not capable of repair	Comment
Item	Subdivision				
1	Electrical service				
2	Fixtures				
3	Solar panels				
4	Batteries				
5	Switches				
6	Sensors				
7	Breaker panel/fuse boxes/disconnects				
8	Grounding				
9	Other items (list)				
10					
11					
12					
13					
14					
15					
16					

Note Items to correct on attached sheets. Also note other comments and any emergency repairs needed.

STANDARD INSPECTION FORM

San Juan NF

1. Facility Inspection Data

Facility #: _____
 Component #: _____
 Inspector: _____

Name: _____
 Name: _____
 Date: _____

2. Component Description

3. Component Repair Evaluation

Deficiency#	Component Description	Line Number	Priority	Unit	Quantity	Unit Cost	Total In_House	Unit Cost	Total W/O&P

D.,E.,F. Porch Posts, Steps, Floors

- (1) Condition _____
- (2) Hazards _____
- (3) Proper Railing _____

G. Windows

- (1) Do all windows operate properly? _____ If not, which? _____
- (2) Types of windows _____
- (3) Need for weather stripping _____ If so, which? _____
- (4) Need for storm windows _____
- (5) Storm windows - effective dead air barrier? _____
- (6) Condition (framing, sills, etc.) _____
- (7) Latches securing properly _____
- (8) Glazing - putty/cracked/broken/weatherstripping _____

H. Doors (Exterior)

- (1) Do all operate properly? _____ If not, which? _____
- (2) Properly weather stripped _____ If not, which? _____
- (3) Need for storm doors _____ If so, which? _____
- (4) Condition _____
- (5) Paint or finish _____
- (6) Latches securing properly _____
- (7) Condition of jambs _____
- (8) Glazing - putty/cracked/broken/weatherstripping _____

I. Shutters

- (1) Operation _____
- (2) Condition _____

J. Screens (doors, windows, crawl space vents)

- (1) Condition _____
- (2) Need for them _____

K.,L. Carport/Garages

- (1) Hazardous storage/hazards _____
- (2) Type of floor, condition _____
- (3) Structural damage _____
- (4) Door type & condition _____

M. Hardware (Refer to 9.A. through C.)

N. Siding (Refer to 4.A.)

O. Puttying/Painting (Refer to 4.A. through N. and 5.A. through I.)

General exterior maintenance requirements/notes _____

5.A.-I. INTERIOR WOODWORK

A.,D. Doors (Interior), including sliding

(1) Do all operate properly? _____ If not, which? _____
(2) Condition _____

B. Sidelites

(1) Operational _____
(2) Condition _____

C. Trim and Molding

(1) Condition _____
(2) Finish _____

E.,F.,G.,H.,I. Closets, Cabinets

(1) Operational _____
(2) Finish/Condition _____
(3) Latches working _____
(4) Doors hanging straight _____

5.A.-I. BUILDING INTERIOR - GENERAL

(1) Ceiling -Type of material _____
Appearance _____
Light reflectivity _____
Need for repainting _____
(2) Walls -Type of material _____
Appearance/condition _____
Need for repainting _____
(3) General - Number of rooms _____

Size of each(Length x Width x Height) OR ATTACH SKETCH -
THIS INFORMATION NOT REQUIRED IF PLANS ARE AVAILABLE:

Living Room _____
Dining Room _____
Bedroom(s) _____
Kitchen _____
Bathroom(s) _____
Storage _____
Garage _____
Office(s) _____
Others (identify) _____

6. STAIRS

- (1) Condition _____ Handrail height/dia. _____
- (2) Height of risers _____ Depth of tread _____ Stairwell width _____
- (3) Hazards/tread material & condition _____
- (4) Construction materials _____
- (5) Storage underneath properly utilized? _____

7. FLOOR COVERING

- (1) Type of subfloor/underlayment _____
- (2) Type of finish floor or covering _____
- (3) Condition & soundness _____
- (4) Estimated remaining life of finish or covering _____
- (5) Base cove & molding condition _____

8. ROOFING

- (1) Type of roofing _____
- (2) Condition _____
- (3) Age _____
- (4) Moss build-up (wood only) _____
- (5) Treatment need (wood only) _____
- (6) Evidence of leakage _____
- (7) Ice build-up (need for heat cables?) _____
- (8) Snow load capacity _____ (design) or (est.) _____

A.,B.,C. Gutters, Downspouts, Drain Tile

- (1) Condition _____
- (2) Cleanliness _____
- (3) Operational _____
- (4) Is drainage directed away from building? _____

D. Shingles (1) Refer to Item 8, under roofing.

E., F. Roof trusses, purlins, beams, joists, & ridge boards

- (1) Adequate for snowload _____
- (2) Condition/Damage _____
- (3) Truss/Beam material, span & spacing _____
- (4) Purlin/Joist material, span, & spacing _____

G. Flashing

- (1) Condition/Existence _____
- (2) Evidence of leakage _____

H. Attic and ventilation

- (1) Flooring/runner plank condition _____
- (2) Hazards _____
- (3) Venting adequate _____
- (4) Evidence of moisture build-up _____

9.HARDWARE

- A. Windows - Refer to Item 4g. - Windows
- B. Doors - Refer to 4h. - Doors
- C. Bathroom - Refer to item 5e. - Cabinets/Closets
- D. Kitchen - Refer to Item 5e. - Cabinets/Closets

10.GLASS A., B., C., D. (Refer to 4 G & 4 H)

Proj.
Priority

11.PLUMBING/SEWER

A.WATER SERVICE - Within Building & to Meter (not distribution system)

(1) General: Service size _____ in. Type of pipe _____ Age: _____ yrs.,
Condition: _____

(2) Kitchen: Sink _____ Faucets _____ Drain _____
Shutoffs _____ Strainer/Plug _____

(3) Bathrooms: Sink _____ Faucet _____ Drain _____
Shutoffs _____ Strainer/Plug _____
Toilet _____ Seal _____ Shutoffs _____
Shower/Tub _____ Faucets _____ Head _____
Drain _____ Strainer/Plug _____
Other _____

(4) Laundry: Tub _____ Faucet _____ Drain _____
Strainer/Plug _____ Washer Connections _____
Other _____

(5) Water Heater: Capacity _____, Temp. Setting _____
Pressure/Temp. Relief Valve _____ Plumbed to Near Floor _____
Fuel _____ Fuel supply/plumbing _____

(6) Outside hydrants: Number _____, protected from freezing _____
Is location or installation hazardous _____
Appearance _____

B. SEWER - Within Building & to Cleanout (not collection/treatment system)

Type (Septic tank, sewer, other) _____

Pipe Material _____

(1) Properly plumbed _____

(2) Are all drains vented within 5 feet? _____

(3) General Condition _____

C. PLUMBING COMMENTS: _____

12. TERMITE OR DECAY DAMAGE

(1) Refer to Items 1 a & c, 2 a & b.

13. FIREPLACE / WOOD HEAT STOVE

(1) Condition - Fire box _____ Flue (Liner) _____
 Chimney _____ Hearth _____
 (2) Type _____
 (3) Cleanliness _____
 (4) Efficiency to heat _____
 (5) Damper _____
 (6) Heatilator _____ Insert _____
 (7) Glass doors _____
 (8) Screen _____

14.ACCESSORIES - If Government owned (i.e.: refrigerator, cook stove, microwave)

Item _____
 Make _____ Model _____
 Year Purchased _____ Size _____
 Present Condition _____

Item _____
 Make _____ Model _____
 Year Purchased _____ Size _____
 Present Condition _____

Item _____
 Make _____ Model _____
 Year Purchased _____ Size _____
 Present Condition _____

Item _____
 Make _____ Model _____
 Year Purchased _____ Size _____
 Present Condition _____

Item _____
 Make _____ Model _____
 Year Purchased _____ Size _____
 Present Condition _____

Item _____
 Make _____ Model _____
 Year Purchased _____ Size _____
 Present Condition _____

15.ELECTRIC

A. Wiring

- (1) Condition _____
- (2) Connection tight, outlets _____, switches _____
- (3) Outlets grounded _____, polarity _____

B. Service & Circuit Controls/Breakers

- (1) Type _____
- (2) Conditon/Age _____
- (3) GFCI's on bath, kitchen, work areas _____

C. Other

- (1) All boxes covered _____
- (2) Electrical condition survey conducted _____ Date _____

16.HEATING & AIR CONDITIONING

A. Primary Heating

- (1) Fuel type: ___ Nat. Gas ___ LPG ___ Oil ___ Wood ___ Coal ___ Electric _____
- (2) Method: ___ Individual Room/Area (type: _____)
 ___ Radiators (___ water ___ steam) ___ Central Forced Air _____
- (3) Unit capacity (BTU/hour) _____, _____, _____, _____, _____, _____
- (4) Is heating adequate? _____
- (5) Year last maintained (needed annually) _____
- (6) Cleanliness: register, chimney flues, furnace room - hazards _____
- (7) Stack condition (pipe to chimney seal) _____
- (8) Filter - oil/air (condition) _____

B. Auxiliary Heating

- (1) Fuel type/method _____
- (2) Safety - insulation/vents/controls _____
- (3) Is heating adequate _____
- (5) Condition _____

C. Cooling

- (1) Type: ___ Std. Refrigeration ___ Evaporative Cooler ___ Heat Pump _____
- (2) Capacity or size _____ Central _____ Single Room/Area _____
- (3) Is cooling adequate _____
- (4) Condition _____

17. SPACE HEATERS (Refer to 16 B)

18. WATER HEATERS (Refer to 11 A.5)

ADDITIONAL ITEMS

The following information may or may not pertain to the present structure that you are inspecting. Complete any pertinent items.

Proj.
Priority

A. DRAINAGE

- (1) Is structure adequately drained? _____
- (2) What drainage structures exist? _____
- _____
- (3) What is needed? _____
- _____

B. SECURITY

- (1) Is building fenced? ___ No ___ Front Fenced ___ Back Fenced ___ Fenced All Around _____
- (2) Is fencing required? _____ Is fencing desired by occupant? _____
- (3) Are gates operable? _____ Lockable? _____
- (4) Outside lighting: _____ None _____ Some _____ Fully Lit _____
- (5) Is lighting adequate? _____
- (6) Any past security problems? _____
- _____
- (7) Is private and Government property adequately protected? _____
- (8) Comments: _____
- _____
- _____

C. ACCESS AND PARKING

- (1) Access surfacing mat'l: _____, width _____ ft. grade _____ % _____
- (2) Is access adequate? _____
- (3) Is structure on main roads? _____ Should it be on main roads? _____
- (4) Parking for _____ vehicles; surface mat'l. _____, grade _____ % _____
- Is parking adequate? _____
- (5) Condition of roads/parking: _____

D. LANDSCAPING

- (1) Is building landscape plan available? _____. Has it been used? _____
- (2) Is structure landscaped? _____
- (3) Is landscaping adequate? _____
- (4) Is adequate water/hydrants available for landscaping? _____
- (5) Does building present an acceptable appearance? _____
- Suggestions _____
- _____
- _____
- _____
- _____
- _____

E. LIQUID FUEL SYSTEM

- (1) Fuel Type: ___ L.P. Gas ___ Natural Gas ___ Fuel Oil ___ Other: _____
- (2) Does Oil Tank meet U.M.C. Std. #5-1? _____
- (3) Does L.P.G. Tank meet N.F.P.A. #58? _____
- (4) Are supports adequate? _____
- (5) Condition/Use of Flex Connectors _____
- (6) Are Barriers needed/adequate? _____
- (7) Is Clearance adequate? _____
- (8) Do Pipe & fittings meet UPC 12XX? _____
- (9) Does Service cock meet UPC 12XX? _____

F. FIRE PROTECTION SYSTEM

- (1) Brief description _____
- (2) Smoke detectors installed per Code? _____ Operating? _____
- (3) Date of last sprinkler system (if any) inspection _____
- (4) Are exits and exit routes adequate & adequately identified? _____
- (5) Is there adequate clearance around the structure from fuels? _____
- (6) Is the structure fire resistant? _____ What could be done to improve fire resistance? _____
- (7) Nearest fire hydrant _____
- (8) Does location & spacing meets FSM requirements, ___ Yes ___ No.
Comments: _____
- (9) Adequate fire protection? ___ Yes ___ No _____
Condition: ___ Excellent ___ Good ___ Fair ___ Poor _____
Comments: _____

I. OTHER

- (1) Are the facilities adequate for their current use? _____
- (2) Is the facility effectively located in relationship to the overall site layout? _____
- (3) Do people living or working in this structure like it? _____
- (4) Occupant remarks concerning the maintenance condition of this building:

- (5) Other comments about this structure:

Use this page to sketch the building & call out dimensions.

Following is an explanation of the project prioritization categories:

- "A" **Essential Funding.** Correction of critical health and safety hazards and Code violations and repairs necessary to keep water, wastewater, and other utility systems functioning, as well as correct critical structural problems that endanger life or health. Also includes "pass-through" funds reimbursement for utility assessments collected from residents as part of their rent.
- "B" **Required Maintenance, Protection of Investment.** Includes correcting wiring & plumbing problems, re-roofing & exterior painting where putting it off would lead to deterioration of the structure, wood-damaging insect control, repairing structural & functional problems, bringing buildings up to current Code standards, etc.
- "C" **Should Do.** Work that's clearly maintenance or replacement work such as repainting grungy interiors, cabinet & other interior maintenance, yard or fence maintenance (not operations stuff like mowing the grass), replacing failing carpet and vinyl flooring, etc. Also includes fixing or replacing non-critical items such as bathroom fans, eve vents, weather seals, etc.
- "D" **Nice to Do.** Work that's clearly maintenance or replacement work such as repainting grungy interiors, cabinet & other interior maintenance, yard or fence maintenance (not operations stuff like mowing the grass), replacing failing carpet and vinyl flooring, etc. Also includes fixing or replacing non-critical items such as bathroom fans, eve vents, weather seals, etc.
- "E" **Non-Maintenance or Not Recommended projects.** Includes projects that should be submitted as capital improvements and renter-desired changes that conflict with Code or FS standards.