Diocese of Galveston-Houston

Office of the Bishop

June 7, 2004

To all Pastors:

Dear brother priest:

It is with great pleasure that I am approving for distribution this *Parish Preventative Maintenance Manual* for use in the parishes and schools of the Diocese of Galveston-Houston. This manual will be of tremendous assistance to pastors and parish Building and Grounds Committees.

The pastoral care of a parish includes more than the care of the faithful. It also includes responsibility for the care of the grounds and facilities of the parish plant. Over the years parishioners have worked hard and sacrificed to provide the funds needed to construct the buildings used for the many aspects of parish life. The pastor must ensure that these facilities, which are part of the parish's patrimony, are properly maintained so that they can serve the parish community for many years as possible.

This manual provides the information needed to be able to establish a parish Building and Ground Committee and the guidelines and processes for the parish to inspect its facilities and provide for scheduled maintenance and capital renewal. Implemented properly, parishes and schools will be able to save considerable money by identifying and correcting problems when they are small and also have sufficient time to save for larger capital expenditure items like roofs and air conditioning.

I am very grateful to the diocesan Construction and Preventative Maintenance Department for the development of this manual. I offer special thanks for Don Senger for his expertise and energy in undertaking this project.

With prayerful best wishes and gratitude for your priestly ministry, I am

Fraternally in Christ,

+ Joseph A. Fiorenza

Most Reverend Joseph A. Fiorenza
Bishop of Galveston-Houston

JAF/mz

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"Whatever you do, work at it with all your heart, as working for the Lord."

Col. 3:23

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- **Step 1 – Forming Your Committee**
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"The men in charge of the work were diligent, and the repairs progressed under them. They rebuilt the temple of God according to its original design and reinforced it ."

2 Chron. 24

INTRODUCTION

INTENTIONS OF THIS DOCUMENT

The intent of this document is to assist you in the formation of a Parish Preventive Maintenance Committee dedicated to a solid Preventive Maintenance Program and the preservation of the assets of the Diocese of Galveston-Houston. To do this, we have attempted to provide a basic, "step by step" "road map" to guide your committee through the process of formation, goal building, systems identification, record keeping, preventive maintenance and capital renewal budgeting, review of diocesan guidelines, and open and on-going communications with the Diocesan Manager of Parish Preventive Maintenance.

This manual is designed to take the Facility Manager step by step through the procedures necessary to form a preventive maintenance committee: identify and evaluate all systems, sub-systems and equipment for each building; identify any deferred maintenance issues, and assign dollar budget amounts to correct current deferred maintenance and future maintenance expenses. In addition, there are various examples for the committee to use as guides (building audits, budgets, forms, etc).

You will find this manual broken into sections. Each section or "step" will take you to the next; and in the end, you should have a solid idea how to construct, develop and administer your preventive maintenance program.

Please remember that I am an extension of your program. Communicate with me...ask questions and share your thoughts with me. Together, we will have a very successful Parish Preventive Maintenance Program.

- **Letter from Bishop Joseph A. Fiorenza**
  Diocesan guidelines include the procedures for preventive Maintenance, on-going and capital renewal budgets

- **Letter from the Diocesan Parish Preventive Maintenance Manager**
  Includes "The Value of Parish Preventive Maintenance"

- **Results of Deferred Maintenance**
  Includes actual cases from churches and schools in various areas in The United States

Diocese of Galveston-Houston

Office of the Bishop

February 5, 2003

To: All Pastors

Re: Policy Letter – Maintenance/Repair

Dear brother priests:

Each pastor has the responsibility not only for the sacramental and pastoral care of his parishioners but also for the proper maintenance of the parish facilities. Your parishioners, and those who have gone before them, have sacrificed greatly to provide the funds needed to construct parish churches, educational and office buildings as well as parish halls and rectories. It is the pastor's responsibility for proper maintenance and repairs to the parish facilities so that they will serve parishioners for generations to come.

Many parishes of the Diocese have been properly maintained over the years; however, many have not. A recent survey of 80 parishes showed that over 75% of these parishes/schools have no funds allocated for maintenance/repairs in this current fiscal year budget. Based on the most recent inspection of parish facilities it is estimated that there is $14 million dollars worth of deferred maintenance work needed on parish and school facilities.

The Presbyteral Council discussed this serious issue at meetings this past year. At its August 6, 2002 and February 4, 2003 meetings the Council recommended a policy that I am approving for implementation, effective **July 1, 2003.** Because this new policy will have budgetary consequences, please be sure to share this policy with members of your parish Finance Council and Pastoral Council. The policy is as follows:

> "Policy: All parishes/schools of the Diocese of Galveston-Houston shall have a regular program for the preventive maintenance and repair of its facilities and allocate sufficient funds in its annual budget to address needed repairs and capital renewal.
>
> Implementation:
>
> 1. All parishes/schools shall have a **Buildings and Grounds Committee.** The committee shall be responsible for identifying and prioritizing maintenance and repair work of the parish/schools grounds and facilities. The Committee should do at least annual inspections of the site and develop an annual and multi-year timeline for repairs and capital expenditures as well as estimated costs associated with the needed work. The Committee reports to the pastor and those who collaborate with him (parish administrator, Pastoral Council, Finance Council).

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2. Every parish/school is to have in its annual fiscal budget a minimum of **.5% of current replacement cost for maintenance and repair and 1% for capital renewal (total of 1.5%).** The maintenance and repair amounts are to be utilized for actual expenditures and are above and beyond the routine expenses associated with salaries and janitorial services. Capital renewal amounts are for the replacement of major facility components such as roofs, HVAC equipment, carpeting, drainage work and other high cost items. Capital renewal funds not spent in the fiscal year should be saved for future year expenditures. Poorer parishes could request financial assistance from the Aid to Poor Parish Fund only after they had exhausted budgeted funds in their maintenance or capital renewal reserve. The same applies for Inner City Schools requesting funds from the Inner City School Fund."

**The funds can be phased in parish budgets in the following manner:
Fiscal Year 2003-2004: .5% for maintenance/repair and .5% for capital renewal (total of 1%).
Fiscal Year 2004-2005: .5% for maintenance/repair and 1% for capital expenditures (total of 1.5%).

**Expense object codes for Maintenance/repair are: 8431, 8432, 8434, 8435, 8461.
Expense object codes for Capital Renewal are: 9871, 9872, 9873.

During the month of March each parish will receive an updated current replacement cost statement from the diocesan Risk Management Office. Over the next few months, the Construction/Preventive Maintenance Department will be hosting meetings around the Diocese to assist pastors and Buildings and Grounds Committee members on how to do site inspections and prepare prioritized maintenance and repair schedules.

I realize that this new policy will add a financial burden to an already tight parish/school budget. However, neglecting ordinary maintenance and repair work of parish facilities only leads to much higher repair costs in the future. It is estimated that in the past few years five times more money than necessary has been spent on major repairs because parishes failed to correct minor problems when they were first detected.

If you have any questions regarding this policy, please contact Mr. Steve Faught, director of the Construction/Preventive Maintenance Department. He and his staff will be happy to assist you.

With prayerful support and appreciation for your ministry, I am

Fraternally in Christ,

+ Joseph A. Fiorenza

Most Reverend Joseph A. Fiorenza
Bishop of Galveston-Houston

JAF/mz
Policy 2003.2

Diocese of Galveston-Houston

Chancery Office

DATE: May 10, 2004

TO: Parish Preventive Maintenance Managers

FROM: Don Senger, Manager
Parish Preventive Maintenance

SUBJECT: New Preventive Maintenance Manual

On behalf of the Diocese of Galveston-Houston and the Construction and Preventive Maintenance Department, we are pleased to present this Preventive Maintenance Manual to your parish.

In the corporate sector, preventive maintenance has proved to be a sound asset management and preservation tool. Driven by profit and loss and "bottom line" requirements, corporations understand that spending money to preserve and maintain expensive assets makes good sense and helps create that all-important bottom line **"black ink"**.

However, in the "not-for-profit" world of the Catholic Church, sound maintenance practices are sometimes overlooked and "deferred maintenance" becomes normal. The idea is that maybe we can save money by deferring the maintenance and that "somehow" the equipment will last as long as its intended life cycle. We have this false hope that by using the "deferred maintenance method" our parish will have a larger checkbook balance. With the Diocese of Galveston-Houston owning over $900,000,000.00 worth of assets (not counting real estate) it is easy to see why preventive maintenance is an important part of running your facility.

This type of thinking, sometimes called "manage to failure", is extremely flawed. Actually, in the not-for-profit world, it is even more important that preventive maintenance measures be in place to preserve, not only the physical assets of the Diocese of Galveston-Houston, but the checkbook operating balance of individual parishes. With funds limited and no profit motivation to offset expenses, there is little money left for the replacement of expensive systems or equipment.

In his February 5, 2003 letter to your parish, Bishop Fiorenza clearly sets forth the guidelines stated by the Diocese of Galveston-Houston that will help you preserve your assets while providing order and accountability in the process.

This manual is intended to be a "guide" for your parish to use in creating and maintaining your Parish Preventive Maintenance Program. Please feel free to add to it, take from it and, in general, adjust it to fit your individual parish needs. We also realize that it may be over-simplified (especially in some of the larger parishes), but it is important to have a program in place with a guiding manual. It has been our desire to create a basic tool that can be used "as is" or amended for a better fit customized to your facility and needs.

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RESULTS OF DEFERRED MAINTENANCE

"Let every priest receive the money from one of the treasurers, and let it be used to repair whatever damage is found in the temple." 2 Kings 12:5

"But by the twenty-third year of King Joash the priests still had not repaired the temple." 2 Kings 12:6

The Construction/Preventive Maintenance Department conducted surveys and studies over the past two years to determine what conditions are present in dioceses across the country. The main purpose of the studies was to see where the Diocese of Galveston-Houston "fits" on average as compared to other diocese in the U.S.

The results were sobering, to say the least. In many areas in general and in the Diocese of Chicago, Milwaukee, New York, Boston specifically, we found that deferred maintenance was so great that it would cost these dioceses tens of millions of dollars just to get their buildings and equipment in decent repair. AS A RESULT OF DEFERRED MAINTENANCE, THESE DIOCESES HAVE HAD TO CLOSE SCHOOLS AND CHURCHES AND CONSOLIDATE PARISHES.

The average age of buildings in the Diocese of Galveston-Houston is forty (40) years. We can look to the older dioceses in the country (Chicago, Milwaukee, New York, Boston) to see in what condition our buildings and equipment will be in twenty or so years.

It was wisely determined by our Bishop that we would not allow our buildings and equipment to deteriorate into the condition of the dioceses mentioned above. Therefore, Bishop Fiorenza has mandated the present Preventive Maintenance Program for the Diocese of Galveston-Houston.

If you are interested in conditions and actions being taken across the country, I have included some information to "start you off". There is a wealth of information on the Internet in regards to churches, building maintenance, the effects of deferred maintenance and the proper care of assets.

United Methodist News Service

The official news agency of The United Methodist Church*Offices in Nashville, New York and Washington

United Methodist churches among those cited as needing repair

Dec. 19, 2001 **News media contact: Thomas S. McAnally• (615)742-5470• Nashville, Tenn.** {587}

By United Methodist News Service

Three United Methodist churches are among "Ten Sacred Places to Save" announced Dec. 17 by a national organization dedicated to the sound stewardship and active community use of America's historic religious properties.

Sen. Joseph Lieberman, D-Conn., a proponent of faith-based social services, made the announcement on behalf of "Partners for Sacred Places" in New Haven, Conn.

The three United Methodist churches on the list are Cass Community United Methodist Church in Detroit, St. Paul and St. Andrew United Methodist Church in New York, and Grace United Church (Presbyterian and United Methodist) in Kansas City, Mo.

Other congregations on the list are Acts of the Apostles Church in Jesus Christ, Philadelphia; Beth Hamedrash Hagodol Synagogue, New York; Crescent Avenue Presbyterian Church, Plainfield, N.J.; Immanuel Presbyterian Church, Los Angeles; Omega Seventh-day Adventist Church, New Haven, Conn.; Pilgrim Baptist Church, Chicago; and St. Augustine of Hippo Episcopal Church, Galveston, Texas.

Partners cited Trinity United Methodist Church in Providence, R.I., as a "model congregation" for progress in sustaining its historic building while serving its community. Epworth United Methodist Church in Denver is on the organization's "watch list."

The "Ten to Save" is a list of older houses of worship that open their doors to the community and have major capital repair needs beyond their congregations' means. Community service programs sponsored by Ten to Save congregations include food pantries, day care centers, homeless shelters, theater companies, a community orchestra and programs for disadvantaged youth. Ten to Save buildings need repairs to leaking roofs, unstable towers and deteriorated masonry, with estimated costs ranging from $200,000 to $4 million.

"The common denominator among these four (United Methodist) congregations is that each has a dynamic, visionary leader helping them make significant change in their struggling communities," said Kalyani Broderick Glass, director of communications for Partners.

Glass told United Methodist News Service that the selection committee was especially impressed with the continuing commitment of United Methodist congregations to addressing entrenched urban social problems. "The United Methodist leadership is to be commended," she said.

For each house of worship on the list, Partners released information on its architectural and historical significance, building condition, repair costs and community outreach.

For Cass Community Church in Detroit, the Partners document says,"Tiffany windows shine in Michigan's poorest neighborhood." The 1883 chapel was designed by Mason and Rice, who were responsible for other landmark Detroit buildings. It includes unusual art nouveau floral and ornamental Tiffany windows and an 1892 Johnson tracker pipe organ, the largest 19th-century organ in Michigan and one of only three Johnson trackers from that period remaining in the United States. The building has a deteriorating roof and a damaged foundation due to decades of water saturation. It needs $750,000 to $1 million, plus at least $150,000 to restore each Tiffany window.

According to Partners, the church serves the poorest ZIP code in Michigan, providing a homeless drop-in center, a warming center for homeless women and children, a free weekly medical clinic, Alcoholics Anonymous groups, and 4,500 meals a week in winter.

The Church of St. Paul and St. Andrew in New York has moved from "demolition to preservation," according to Partners. In addition to the United Methodist congregation, the 1897 French neo-classical building provides space for a Jewish congregation, an Ethiopian Evangelical Church, and Iglesia Christo Vivo, a predominantly gay and lesbian Latino congregation. For many years, the church opposed designation as a city landmark. The church challenged the landmark status to the Supreme Court, which refused to hear the case. The building has a leaking roof and massive failure of its exterior terra cotta, caused by decades of deferred maintenance. Immediate repairs will cost at least $350,000, and total repair costs could be several million dollars.

Among its many outreach ministries, St. Paul and St. Andrew houses West Side Coalition Against Hunger, the largest food pantry in New York City, providing food for 2,000 meals a day, 500,000 meals a year. It also hosts the Mainstream Nutrition and Health Center, which serves 100 meals a day to seniors at the church, and delivers 450 meals a day to homebound seniors. In 2000, the program served 203,000 meals. The congregation has also been actively responding to needs following the Sept. 11 terrorist attacks.

Grace United Church is making a difference in a multicultural neighborhood in Kansas City, according to Partners. The 1907 native stone structure has a leaking roof caused by water damage to the interior. Repair to the roof and windows will cost $200,000. The church serves 2,500 people a month in a low-income area with many immigrants. Its many services include a food pantry, job and referral program, emergency utility and rent assistance, computer and English-as-a-second-language classes and a translation service. It also sponsors a Peace Making Academy, which teaches children alternatives to violence, and Tomorrow's Leaders and Community, which provides adolescents with job training, peer mentoring and communications skills.

Trinity United Methodist Church in Providence, R.I., is cited as a model congregation. In 1995, the Providence Preservation Society named Trinity, the National Register-listed birthplace of Trinity Square Repertory Theater, to its "Ten Most Endangered " list. The 1917 Gothic revival theater building had been closed for three years since water pipes froze and burst, causing flood damage. In 1998, the Rev. Anne Grant was appointed to lead the multi-ethnic congregation. Within two years, the building was reopened for community use.

Partners officials said Trinity is "an example of the great difference a strong leader can make and a national model for how congregations can care for their historic sacred places."

Regarding its Watch List, Partners said community-serving activities might be in jeopardy if Epworth United Methodist Church in Denver does not address foundation leaks and deteriorating masonry in the next few years. The English Gothic revival building, built in 1908, serves one of Denver's poorest communities.

"In our nation's time of need, and in the midst of this very holy season, it should be clearer than ever what our churches, synagogues, mosques and temples mean to our communities," Lieberman said. "They are much more than houses of worship. They are anchoring centers of community service and moral leadership."

A Preliminary Case Statement in Support of Our Facility Consolidation and Maintenance Plans

Introduction

After several years of discussion and preparation, the Catholic churches of Hibbing formally united to form the Hibbing Catholic Community in July, 1999. The consolidation of these three parishes resulted in a greater scope and quality of parish services and ministries. At the same time, we realized a reduction in operating costs through the more efficient utilization of staff.

Now we are poised for the next steps in the consolidation process, which will enable us to further improve our parish and better serve the Catholic community of Hibbing well into the future.

Our Needs

One problem that remains is that while we are consolidated administratively, we continue to worship at three churches and educate our children in two schools. While we all enjoy attending Mass where we are most comfortable, it is becoming increasingly impractical to maintain all of our buildings. Our facilities are aging; they are difficult and expensive to maintain; and they do not fully meet the liturgical, educational and administrative needs of today.

We must remember that Blessed Sacrament Church was built in the 1930s, Immaculate Conception was built in 1952, and our newest facility, St. Leo's, was built in 1961. Our buildings have systems that are 40 to 80 years old. They are in need of major renovation or should be completely replaced.

Thorough facility assessments have revealed the following deficiencies:

Blessed Sacrament Church

- The sound system and lighting are inadequate
- The heating system is deteriorating, and is very difficult to regulate
- The organ needs substantial repairs; and exterior doors and some floor tiles need replacement.
- The bathrooms are not handicapped accessible.
- There is no space conducive to social events; and funeral luncheons conflict with the school schedule.
- The kitchen at Assumption School is inadequate to prepare food for major parish events.

Immaculate Conception Church

- The social hall and bathrooms are not handicapped accessible.
- Heating is difficult to control and valves are continually being replaced; there are problems with the dishwasher leaking.
- An electrical panel is located above the kitchen sink, which presents safety hazards.

St. Leo's Church

- The facility is not handicapped accessible.

- Plumbing is failing. This also affects the heating system.
- Asbestos tiles are coming loose and need to be replaced.
- Funeral luncheons conflict with the school schedule.

Parish Center

- Office space is insufficient and inappropriately configured to meet staff needs.
- The Senior Associate has no permanent office space.
- The available space is not easily accessible.
- The block and concrete construction makes it difficult to upgrade for technology.
- There are no conference or meeting rooms; and the dining room is not adequate to host larger meetings.
- A converted garage space used for Bible Study is difficult to heat in the winter.
- Storage space is inadequate.
- Space for office equipment is insufficient; there is no work space in which to complete large projects.

Convent

- The entire convent infrastructure (plumbing, heating, electrical) is deteriorating, as is the exterior brickwork. In its current state, the building is unfit for use.

Schools

Educational Needs

- Space is inadequate for current programming. Currently, we maintain two school buildings to serve 265 students. We also educate over 400 children in our religious education programs. No one facility can accommodate our needs.
- Separate sites disrupt the unity and continuity of educational offerings. Many families must transport children to separate campuses.
- Teaching methods, space use and technology have changed dramatically since our facilities were built. Modifying buildings to meet these needs is cost prohibitive.
- There are inefficiencies in administration and facilities management in operating andmaintaining two separate campuses.

School Facilities Needs

- The schools are exhibiting the same structural and mechanical deficiencies as the churches, and face the same concerns of deteriorating systems. After the convent, Assumption School exhibits the greatest needs for repair and maintenance.

Our Plans

We have broken down the deferred maintenance costs for all our buildings over a ten-year period, and have prioritized improvements based on urgency. At an estimated cost of $8 million, the price to repair everything that needs fixing is staggering. In response, parish leaders have developed an exciting plan - a plan that calls for honoring our past as we address the needs of both today and tomorrow.

Consequently, our proposed plans call for the consolidation of worship and school space at the same

location. This would be achieved through the following:

- *Building a new school at the Blessed Sacrament site.* This would include the demolition of the current school and convent. The new school will allow for a much more efficient and effective educational system and eliminate operational and administrative redundancies. More importantly, however, it will allow our Hibbing Catholic Community to offer the type of quality Catholic education that our students need and deserve as we prepare them to be tomorrow's leaders.
- *Using Blessed Sacrament Church as our parish's primary worship space.* As Blessed Sacrament is the "mother church" for the parish and is the largest church, seating over 800 people, this site is the logical choice. Deferred maintenance and improvements would be addressed to enhance the worship space at Blessed Sacrament thus creating a welcoming environment for our parish's 1,800 families. Maintenance issues will also be addressed at the priests' residence.
- *Maintaining Immaculate Conception Church as an integral part of the parish, used for one Mass on the weekends and also for funerals and other special liturgies.* A comprehensive attendance study has determined that offering weekend Masses at Blessed Sacrament with one Mass at Immaculate Conception will be sufficient for the liturgy and worship needs of our families. Deferred maintenance and improvements would also be addressed at Immaculate Conception, along with improvements to the house and garage.
- *Building a new Parish Center at the Blessed Sacrament site.* This would provide a professional environment where our priests, staff and volunteers can work to meet the needs of our parish. The new Parish Center would also include much needed public and private meeting rooms.
- *Constructing a new Social Hall/Multi-use addition to Blessed Sacrament Church.* This facility would include a large social hall for parish activities and events, a multi-use room for meetings, a kitchenette, storage, accessible restrooms and other useful areas.

This plan means that the St. Leo's site will eventually be closed and sold. While we realize how difficult this will be, we believe that this plan best serves our parish and parishioners now and in the future. However, we will be respectful of the hard work and dedication that built St. Leo's. We will retain some of the treasured aspects and artifacts of St. Leo's to be incorporated into the new facility.

Costs and Campaign

As previously stated, the cost to upgrade, repair and maintain our current facilities would be $8 million, and we would still have three sets of buildings to keep up. After thorough discussion and consideration, both our finance council and strategic planning facility committee have recommended consolidating our facilities. Even though the initial cost is higher, in the long run, we would realize savings and promote the unity of our one Catholic family.

The cost of the proposed project is estimated to be approximately $13 million. This includes construction of a new school, parish center and social hall at the Blessed Sacrament site, along with the deferred maintenance and improvement costs at Blessed Sacrament Church and Immaculate Conception Church.

To raise the sums required, a capital fund raising campaign would be held, and parishioners would be asked to consider special gifts or *pledges* - over and above their current contributions, payable over a three to five year period of time. *Non-cash gifts* such as securities, real estate and personal property would also be encouraged and accepted as would *deferred gifts* such as life insurance policies, gifts in trust and gifts through one's estate.

We hope some extraordinary gifts will be given during the campaign to help us reach this extraordinary goal.

Summary

The challenge presented in the Facility Consolidation and Maintenance Plan is significant - in fact, it is historic. As our parish enters its second century of existence, its future depends on us. As we have benefited from the sacrifices of our parents and grandparents who built our current facilities, so our children and grandchildren will benefit from the sacrifices we are now being asked to make. With the generous support of each and every one of us, the plans outlined above can become a reality.

May God bless and guide all that we do in His Name. May He give us the courage to make the sacrifices necessary to prepare a future full of hop for those who will come after us and call our Hibbing Catholic Community their spriritual home.

For a financial summary of the Options for Review prepared by Architectural Resources, Inc, of Hibbing, please select: Options for Review

To return to Hibbing Catholic Community Home Page: Home

ARCHITECTURAL RESOURCES • INC.

ARCHITECTURE • ENGINEERING • LANDSCAPE ARCHITECTURE • INTERIOR DESIGN

• HIBBING CATHOLIC COMMUNITY •

OPTIONS FOR REVIEW
ARI Project # 02-050

July 30, 2002

Option A1*: New K-8 School and Parish Center at Blessed Sacrament site. Demolish Assumption School and Convent. Abandon St. Leo's campus.

Option A2*: New K-8 School at Blessed Sacrament site; remodel Assumption School to accommodate Parish Offices and Religious Education. Demolish Convent. Abandon St. Leo's campus.

Option A3*: New K-8 School at Blessed Sacrament site. Remodel Priest's Residence to accommodate Parish Offices; locate/build new residence. Use new school classrooms for Religious Education needs. Demolish Assumption School and Convent. Abandon St. Leo's campus.

Option B1:** K-8 School at St. Leo's with addition. Remodel Assumption School to accommodate Religious Education and/or Parish Offices. Demolish Convent.

Option B2:** K-8 School at St. Leo's with addition, use school classrooms for Religious Education. Parish Offices to remain. Demolish Assumption School and Convent.

Option C: Maintain status quo; demolish Convent

Option D: Social Hall/Multi-Use Addition to Blessed Sacrament Church.

* Purchase/acquire new land (adjacent existing residential property) for parking

** Purchase/acquire new land (adjacent existing residential property) for parking/site development?

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J1

HIBBING CATHOLIC COMMUNITY
Options for Review
ARI Project # 02-050
July 30, 2002
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Option A1: New K-8 School and Parish Center at Blessed Sacrament site. Demolish Assumption School and Convent. Abandon St. Leo's campus.

1.	Deferred Maintenance & Improvement Cost Projections •Blessed Sacrament Church & Priest's Residence •Immaculate Conception Church, House & Garage	$ 2,196,000.00
2.	Raze Assumption School	225,000.00
3.	Raze Convent	50,000.00
4.	New K-8 School @ Blessed Sacrament (62,300 sf @ $120.00/sf)	8,971,200.00
5.	New Parish Center @ Blessed Sacrament (5,200 sf @ $110.00/sf)	686,400.00
6.	**TOTAL BUDGET PROJECTION**	**$12,128,600.00**

Option A2: New K-8 School at Blessed Sacrament site; remodel Assumption School to accommodate Parish Offices and Religious Education. Demolish Convent. Abandon St. Leo's campus.

1.	Deferred Maintenance & Improvement Cost Projections •Blessed Sacrament Church & Priest's Residence •Immaculate Conception Church, House & Garage	$ 2,196,000.00
2.	Renovate Assumption School (±)	1,000,000.00
3.	Raze Convent	50,000.00
4.	New K-8 School @ Blessed Sacrament (62,300 sf @ $120.00/sf)	8,971,200.00
5.	**TOTAL BUDGET PROJECTION**	**$12,217,200.00**

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HIBBING CATHOLIC COMMUNITY
Options for Review
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Option A3: New K-8 School at Blessed Sacrament site. Remodel Priest's Residence to accommodate Parish Offices; locate/build new residence. Use new school classrooms for Religious Education needs. Demolish Assumption School and Convent. Abandon St. Leo's campus.

1. Deferred Maintenance & Improvement Cost Projections .... $ 2,196,000.00
   - Blessed Sacrament Church & Priest's Residence
   - Immaculate Conception Church, House & Garage
2. Raze Assumption School 225,000.00
3. Raze Convent 50,000.00
4. New K-8 School @ Blessed Sacrament (62,300 sf @ $120.00/sf) 8,971,200.00
5. Remodel Priest's Residence to Parish Center 0.00
   (Note - Assume costs in deferred maintenance covers these costs.)
6. New Priest's Residence (assume purchase & renovation) 200,000.00
7. **TOTAL BUDGET PROJECTION** $11,642,200.00

Option B1: K-8 School at St. Leo's with addition. Remodel Assumption School to accommodate Religious Education and/or Parish Offices. Demolish Convent.

1. Deferred Maintenance & Improvement Cost Projections .... $ 4,828,250.00
   - Blessed Sacrament Church & Priest's Residence
   - Immaculate Conception Church, House & Garage
   - St. Leo's Church & School
   - Parish Center
2. Raze Convent 50,000.00
3. Remodel Assumption School 1,000,000.00
4. Remodel St. Leo's School (38,300.00 sf @ $80.00/sf) 3,676,800.00
5. Addition to St. Leo's School (32,300 sf @ $130.00/sf) 5,038,800.00
6. **TOTAL BUDGET PROJECTION** $14,593,850.00

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Option B2: K-8 School at St. Leo's with addition; use school classrooms for Religious Education. Parish Offices to remain. Demolish Assumption School and Convent.

1.	Deferred Maintenance & Improvement Cost Projections •Blessed Sacrament Church & Priest's Residence •Immaculate Conception Church, House & Garage •St. Leo's Church & School •Parish Center	$ 4,828,250.00
2.	Raze Convent	50,000.00
3.	Raze Assumption School	225,000.00
4.	Remodel St. Leo's School (33,100 sf @ $80.00/sf)	3,177,600.00
5.	Addition to St. Leo's School (37,500.00 @ $130.00/sf)	5,850,000.00
6.	**TOTAL BUDGET PROJECTION**	**$14,130,850.00**

Option C: Maintain status quo; demolish Convent.

1.	Deferred Maintenance & Improvement Cost Projections	$8,171,250.00
2.	Raze Convent	50,000.00
3.	**TOTAL BUDGET PROJECTION**	**$8,221,250.00**

Option D: Social Hall/Multi-Use Addition to Blessed Sacrament Church.

1.	7,000 sf @ $150.00/sf			$1,260,000.00
	a.	Social Hall	4,500 sf	
	b.	Multi-Use Room •Bridal Use •Own Restroom •Kitchenette	400 sf	
	c.	Restrooms	400 sf	
	d.	Storage	150 sf	
	e.	Coats	150 sf	
	f.	Mechanical/Custodial	200 sf	
	g.	Circulation & Structure	1,200 sf	
2.	TOTAL BUDGET PROJECTION			$1,260,000.00

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J4

ARCHITECTURAL RESOURCES · INC.

Hibbing Catholic Community
Options For Review
ARI Project #02-050
16-Jul-02

Option	Blessed Sac. Church	Assumption School	Convent	St. Leo's Church	St. Leo's School	Parish Center	I.C. Church	Priest's Res.	I.C. Res.	*New Faci*
A1	Current use	Demolish	Demolish	Abandon	Abandon	Abandon	Current use	Current use	Current use	K-8, Parish Offices and Religious Ed
A2	Current use	Parish Offices, Religious Ed	Demolish	Abandon	Abandon	Abandon	Current use	Current use	Current use	K-8
A3	Current use	Demolish	Demolish	Abandon	Abandon	Abandon	Current use	Parish Offices; new residence required	Current use	K-8, Religi Education
B1	Current use	Religious Ed. - Parish Offices?	Demolish	Gymnasium	K-8, addition with new sacred space	School use	Current use	Current use	Current use	None
B2	Current use	Demolish	Demolish	Gymnasium	K-8, addition with new sacred space, religious education	Current Use	Current use	Current use	Current use	None
C	Current use	Current Use	Demolish	Current Use	Current Use	Current Use	Current use	Current use	Current use	None
D	Can be used with any option above									

AMERICAN SCHOOL & UNIVERSITY

The Next Phase

By John Oualline and Carl Rabenaldt

American School & University, Aug 1, 2002

Budget cuts are hitting education facility administrators hard. In the face of staff reductions, shifting priorities and stalled initiatives, facility managers are charged with identifying efficiency measures and doing "more with less."

One of your budget cuts may have been a comprehensive, benchmark facility assessment because it represented significant expenditures of time and money. Or, maybe you never budgeted for an assessment. In either case, regressive budget periods are prime times to assess what's broken and what's missing. Now is the time to strategically plan your capital renewal and deferred maintenance (CRDM) correction program for better times and budgets ahead. A condition assessment of physical assets can help accomplish this task.

Can you get facility-condition data in a more strategic way — doing more with less? By conducting the facility assessment in phases, you can get the data you need when you need it, and level your capital and time expenditures into more manageable amounts.

Take a look

A comprehensive facility condition assessment (FCA) provides detailed data to support a capital renewal and deferred-maintenance program. It helps facility administrators identify, estimate and prioritize existing deferred maintenance and predict capital-renewal requirements across their entire real asset portfolios.

Identifying and addressing CRDM issues are critical facility-management activities. Neglect and chronic underfunding of capital renewal and the resulting deferred maintenance threatens the educational mission of many institutions. A minor loss of occupancy resulting from an unfunded deficiency correction can cost an institution thousands of lost staff hours and hundreds of thousands of dollars in emergency work orders.

The amount of data produced in a comprehensive facility assessment is practically unmanageable unless it is captured digitally within a database. Facility-assessment services are available that have incorporated assessment "best practices" and facility bench-marking into sophisticated FCA software. From single-user to multi-user to web-based options, these packages can provide facility administrators with IT tools that can efficiently track standards, functional conditions, deferred maintenance, lifecycle capital renewal issues and anything else that is broken, missing or inadequate within a facility or its infrastructure.

A statistical perspective

Revealing statistics can be inferred from the FCA databases documented over the past five years. Consider these statistical averages derived from a sample of 50 million square feet taken from a mix of

higher-education institutions across the United States:

- Average of one deficiency per 1,500 square feet over the total portfolio.
- Average deficiency correction cost is $65,000.
- Average portfolio Facility Condition Index is 29 percent.
- Average building replacement cost is $152 per square foot.
- Total deferred maintenance plus capital modernization costs average $45 per square foot. This is in addition to normal operations and maintenance costs.

Each deficiency on average requires other inter-related corrective actions, and some offer the opportunity for collateral improvements. Some deficiencies can be corrected using maintenance and operations (M&O) work orders, while more involved corrections require capital or renovation funding. The cost for correcting the total assessed deferred renewal usually far exceeds available annual M&O funding. If you calculate building system renewal over an anticipated facility life of 50 to 100 years, annual capital renewal funding requires about 2.74 percent of the current facility replacement cost (constant dollars) in addition to normal operations and maintenance spending needed to operate a facility.

A phased solution

Because deficiency correction amounts are great and CRDM budgets limited, only the highest priority items are usually corrected. The remaining non-critical items are carried forward to the next budget cycle and added to the unrelenting rain of new capital renewal items coming due. What this means is that about half the data collected during a comprehensive facility assessment is not used.

Compounding this inefficiency, facility conditions constantly change. New correction needs, shifting priorities and obsolete database information result. Changing facility conditions suggest a data refreshment cycle every 3 to 5 years, if not continuously.

Phasing the comprehensive assessment activities — breaking it down into complementary work products — provides scalable capital renewal and deferred maintenance data that is useful on many levels. Five primary assessment levels can occur within a comprehensive facility assessment:

- **Empirical-level modeling**

  Comparision to like-facility portfolio database to interpolate probable facility condition. Example: 1975 building lookup within database of similar 1975 buildings to predict probable FCI.

- **System-level modeling**

  Comparison using component system life-cycle models developed from trade standards, historical records and staff input. Example: 1975 building broken into component systems and corresponding renewal cycles to predict FCI and estimate current expired system costs.

- **System-level audit**

Physical audit of facility to confirm component life-cycle model and to record detail system adjustments. Example: 1975 building modeled for system renewal cycles and physically audited to record system adjustment costs, to estimate expired system costs and predict renewal system costs.

- **Deficiency-level audit**

  Physical audit of facility to confirm component life-cycle model and to record detail component deficiencies. Example: 1975 building modeled for system renewal cycles and physically audited to record detailed deficiencies to calculate FCI, predict renewal system costs, and estimate current deficiency correction costs.

- **Project-level audit**

  Deficiency-level audit, adequacy analysis and work scope definition for project execution. Example: 1975 building audited on a deficiency level combined with functional adequacy program definition to develop capital project contract documents.

Each assessment level can provide data corresponding to a level of data needed, from general portfolio status to detailed project status. This type of assessment phasing can benefit facility management and planning in various ways (see chart on p. 173). Note the time and deliverables available at each level to see how you can do more with less.

A value proposition

Phased facility assessments, matching available time and effort to desired deliverables, offer real benefits:

- Reaching a budget number quickly with minimum cost to secure funding and administrative approvals.
- Prioritizing corrective actions and matching corrective actions with available funding streams.
- Keeping assessment data current.
- Stretching your resources to do more with less can lead to innovative approaches that can shrink big problems into manageable ones. In times of budget cutbacks, phased assessment tools can help get your renewal and maintenance needs proactively aligned with funding realities — and get better results doing "more with less."

Oualline, AIA, and Rabenaldt lead the Facilities Group specializing in facility assessments at 3D/International, Houston.

AMERICAN SCHOOL & UNIVERSITY

A Budget Deferred

Joe Agron

American School & University, Apr 1, 1999

Growing demands placed on school districts continue to stretch thin available dollars, and maintenance and operations (M&O) budgets remain a prime target for cuts. But this should be of no surprise; M&O traditionally has been shortchanged, resulting in some school facilities that have a deferred maintenance backlog dating back 10 years or more-and deficiencies that are growing exponentially.

Nationwide, school districts allocated just more than nine percent of their net current expenditures (NCE) to M&O in the 1998-99 school year, according to American School & University's 28th annual Maintenance and Operations Cost Study. This represents the second year in a row that schools are using a smaller percentage of their budgets to preserve and run their facilities, which amounts to much less than the 13 percent of NCE earmarked a little more than a decade ago.

Survey methodology To arrive at the results for the most recent M&O Cost Study, an in-depth survey was mailed to approximately 6,000 chief business officials at public school districts with enrollment of more than 600 students. Administrator were asked to document various M&O costs, including salary/payroll, energy, outside contract labor, maintenance equipment and supplies, and utilities.

Surveys were analyzed, and the median number for each category (i.e., payroll, outside contract labor, gas, electricity, equipment and supplies, etc.) was identified on a national and regional level. In no case were regional medians added or averaged to arrive at the national figures. National medians were calculated by analyzing every survey in each category and identifying the median number. Be aware that the number of responses received from each region will directly affect final figures reported from year to year.

Data reported identify budgeted expenditures for M&O per student and per square foot for the 1998-99 school year. Following are the categories used on the survey questionnaire:

-Budgeted: Amounts for the 1998-99 school year, reported as of the November 1998 survey deadline.

-Per student: Based on enrollment (average daily attendance as of October 1998).

-Per square foot: Based on total gross area of all district buildings maintained, including corridors, common space and offices.

-NCE (net current expenditure): Total district expenditures, including teacher salaries, minus the cost of capital outlay, debt service and transportation.

-Total maintenance and operations expenditures: Including salaries, fringes, overhead, energy, utilities, outside contracts, equipment and supplies, etc., for maintenance, custodial and grounds.

-Custodial: Those individuals responsible for building upkeep and cleaning.

-Maintenance: Those individuals who perform skilled jobs, such as HVAC, plumbing or electrical repair.

-Grounds: Those individuals responsible for landscape upkeep and maintenance.

-Payroll: Including fringes.

-Average salary: Annualized, excluding fringes.

-Outside contract labor: Those hired for specialized jobs to maintain or repair building systems or equipment, such as HVAC maintenance or repair.

-Other fuel: Including oil and coal.

-Other utilities: Including water, telephone, etc.

-Other: Most often identified as clerical costs, equipment repair and rental, trash removal, travel expenses and insurance.

When comparing your district's M&O expenditures with the regional and national medians reported, keep in mind that all costs are greatly affected by the age and overall condition of buildings, the labor market in your area, climate, as well as other factors over which school officials have limited control. Also, because medians are used and the majority of the nation's school districts-and respondents to the survey-are small- to medium-size (median student enrollment of 2,192), costs at large school systems may vary significantly.

Facts and figures In addition to the detailed charts and graphs that follow, the survey found that, at the national level, the median public school district has 16 full-time custodial, four full-time maintenance and two full-time grounds personnel. The amount of square feet maintained per custodian has increased from what was reported in last year's survey (21,429 square feet compared to 20,612 square feet last year). Acreage maintained per grounds worker also increased to 40 from 33 last year. A new breakout-square feet maintained per maintenance worker-is in response to numerous requests. However, use caution when comparing this figure (93,255 square feet) because job responsibilities for maintenance professionals vary significantly from district to district.

The national median salary for custodial personnel is $20,538 (down 3 percent), $27,938 for maintenance personnel (up 5 percent) and $24,002 for grounds personnel (up 5 percent). In addition, 16 percent of school districts report that they contract out M&O services to a private firm, while 18 percent use privatized grounds services.

Transportation costs make up a smaller percentage of total district expenditures for the 1998-99 school year. The median district spends 3.8 percent of its total budget on transportation ($261.62 per pupil).

Regional breakdowns More than one-third of the highest costs in per-student and per-square-foot categories are reported in Region 2. Consisting of just two states, New Jersey and New York, the region leads the pack in per-student expenditures for custodial and grounds payroll, grounds equipment and supplies, total M&O, total NCE and transportation. It had the highest per-square-foot costs for custodial payroll, gas and grounds equipment and supplies. The highest salaries for custodial, maintenance and

grounds personnel can be found here, as well.

Region 9 logged in the highest per-student cost for maintenance payroll; and per-square-foot costs for maintenance and grounds payroll, other utilities, total M&O and total NCE.

Among other regions reporting the highest expenditures per category include Region 4 (acres maintained per grounds worker, per-square-foot costs for electricity and other, and per-student cost for other), Region 8 (per-student costs for other fuel, maintenance equipment and supplies, M&O as % NCE, and tied for per-square-foot cost for other fuel), Region 5 (per-student costs for outside contract labor, and per-square-foot costs for outside contract labor and maintenance equipment and supplies), Region 1 (square feet maintained per maintenance worker, and tied for per-square-foot costs for other fuel), Region 6 (per-student costs for electricity and other utilities), Region 7 (square feet maintained per custodian and per-student cost for gas) and Region 3 (transportation costs as a percentage of total district expenditures).

Some of the lowest expenditures per category were reported by Regions 8 and 9. Region 8 posted the lowest per-student costs for grounds payroll and total NCE, and per-square-foot costs for grounds payroll, electricity, other, total NCE, and tied for grounds equipment and supplies. Region 9 had the lowest per-student costs for electricity, total M&O and transportation, and tied for transportation as a percentage of total district expenditures. It also reported the lowest square feet maintained per custodian and maintenance worker, and acres maintained per grounds worker.

Region 1 reported the lowest expenditures in a number of categories, including per-student costs for maintenance payroll, gas and other utilities, and per-square-foot costs for gas, maintenance payroll (tied) and other utilities (tied). Region 4 had the lowest per-student costs for custodial payroll and maintenance equipment and supplies, as well as per-square-foot costs for maintenance equipment and supplies, grounds equipment and supplies (tied), and other fuel (tied).

Region 6 had the lowest salaries for custodial, maintenance and grounds workers, transportation costs as a percentage of total district expenditures, and custodial payroll per square foot. Region 7 reported lows in per-student costs for outside contract labor and other, and per-square-foot costs for total M&O, outside contract labor and maintenance payroll (tied).

Other lows are reported in Region 3 (per-student costs for grounds equipment and supplies, and tied for per-square-foot costs for other utilities, and grounds equipment and supplies), Region 5 (per-student costs for other fuel and tied for per-square-foot costs for grounds equipment and supplies, and other fuel), and Region 2 (M&O as % NCE).

Repeat offender A majority of the nation's school facilities are in a crisis situation. Millions of children are being forced to attend school in poor and often dangerous buildings. The problem is well-known and well-documented-as are the causes, of which deferred maintenance is one. However, school districts will be unable to adequately address appropriate maintenance and operations of facilities until more resources and funding are made available.

A number of state and local governments, as well as national lawmakers (see Editor's Focus, p. 8), are proposing measures to attack poor and unsafe school building conditions. It is a massive problem that will require monumental assistance.

"For even the Son of Man did not come to be served, but to serve and to give his life as a ransom for man."

Mark 10:45

FORMING YOUR COMMITTEE

- **Initial Formation of the Preventive Maintenance Committee**
- **Meetings**
- **Election of Officers**
- **Mission Statement**
- **Preventive Maintenance Committee Responsibilities**
- **Procedures**

INITIAL FORMATION OF THE PREVENTIVE MAINTENANCE COMMITTEE

The foundation (committee members) for the Preventive Maintenance Committee is crucial to the success of the entire program within the parish. We would recommend that three to six persons be utilized as your Preventive Maintenance Committee. Finding the right people for the committee is of utmost importance. One very important question raised is "how do we find these people?" The Chairperson or President of the committee could be someone chosen by the pastor. In some parishes, a deacon or the Parish Administrator is the Chairperson for the committee. However, deacons and administrators generally have a full schedule; therefore, asking them to chair yet another committee may not be an option. Another way to fill positions for the committee would be a notice in the church bulletin running for two or three weeks. These are strictly volunteer committee positions and may take some time to fill. The ideal candidates would be persons with building management experience, trade skills and/or code knowledge; although the best asset for the candidates would be those with great attitude and those persons who are eager to assist the pastor in the preservation of the church assets. The members would not be expected to actually perform any of the maintenance but should be available to inspect the buildings and equipment for assessment. Don Senger, Manager, Parish Preventive Maintenance is available to meet with you to assist you in the formation of your committee and can provide to you a presentation showing committee structures and systems. It is Don's desire to be of assistance and to continue to be available to you.

MEETINGS

The committee should agree on a monthly meeting night and time. This may be determined by the committee members' schedules and other volunteer workloads within the parish. You should be able to reserve a room for your meetings with the Parish Secretary or Parish Administrator. Try to have all members attend the meetings regularly. Consistency and enthusiasm will be very beneficial to your program. Regardless of the committee structure, someone should be designated to create and keep meeting notes or minutes.

ELECTION OF OFFICERS

You will want to elect officers of the committee as soon as possible. You should have a chairperson, a vice-chairperson and a secretary/recorder. You could also form as a "round table" committee with a moderator and a more casual atmosphere. The initial style of your committee and its positions should be filled by a majority vote with each member having one vote to cast. You can determine in your own committee how long each term should be. It might be suggested that the committee members' terms be three or four years with an annual election of officers. Some committees, however, may choose to have unlimited terms with members staying on the committee as long as they desire. With the type of systems and equipment under the watch of this committee, a longer term is strongly suggested in an effort to build a "track record" on the systems and equipment

and for committee members to familiarize themselves with procedures, equipment and systems. The committee should be solid enough and have terms long enough to be effective in their goals.

MISSION STATEMENT: Each committee should develop a solid mission statement as a foundation for the spirit of the committee and its goals. For example:

To provide St. Theresa Catholic Community with a Preventive Maintenance Committee and to design, develop and administer a comprehensive preventive maintenance program that will preserve and protect the buildings and the physical plant as well as all equipment serving the church community. In addition, it is the goal of the Preventive Maintenance Committee to provide and adhere to an operational budget that will make provisions for a percentage of assessed value of assets as a "set aside" fund conforming with the Diocese of Galveston-Houston outline for replacement or major repairs to those physical assets of St. Theresa Catholic Church and the Diocese of Galveston-Houston.

PREVENTIVE MAINTENANCE COMMITTEE RESPONSIBILITIES:

Once the committee is formed, it should create an action plan that will:

- Initiate a preventive maintenance program conforming to the guidelines as set forth by the Diocese of Galveston-Houston. Please feel free to utilize the guidelines from the Diocese and Don Senger as a resource and aid in forming your program.

- Create and administer a Preventive Maintenance Budget utilizing asset replacement values and percentages as set forth by Galveston-Houston Diocese as a minimum.

- Create and coordinate a record of systems and equipment at your parish. Keep the record file at your parish and, if the committee agrees, keep an additional set of records with one member of the committee. It is important that the **parish** be the **primary keeper** of the information.
  Note: If computer and/or computer service is not available, written records are acceptable.

- Create schedules for maintenance with accurate records of services performed and repairs or replacements completed.

- Conduct preventive maintenance audits: Committee members should take enough time to thoroughly audit all of the property including building interior/exterior, parking lots, walkways, breezeways, etc. Perform this audit annually. In addition, committee members should perform a monthly walk through of property as well.

- Conduct and attend monthly meetings for updates, to address various preventive and on-going maintenance issues. In addition, monthly meetings are used to review the budget as well as to address any issues or concerns regarding the preventive maintenance program within the parish.

- Communicate with Don Senger, Manager Parish Preventive Maintenance Galveston-Houston Diocese, on a regular basis. This open communications policy between your committee and Don will benefit everyone. (Don will be available for advice and support as well as a source of vendors, materials, equipment, etc).

- Advise your pastor of meetings, progress, and any issues regarding preventive maintenance at the church (Please try not to take too much of your pastor's time. He has a lot of responsibilities and his time may be very limited. Ask him how much or how little he'd like to be involved in the program. You may find that a monthly or quarterly report to him is sufficient.).

- Identify capital renewal items for planning and budgeting purposes.

PROCEDURES

The Preventive Maintenance Committee will establish procedures for the following:

- Contractor screening and selection process
- Preventive maintenance contracts (where applicable)
- Short, medium and long term plans for replacement of assets
- Prioritization of repairs and replacement of assets and equipment
- A written plan to use as a guide to implementation of the above listed goals and responsibilities.

CONTRACTOR SCREENING AND SELECTION (This is a critical step in creating a solid preventive maintenance program for your parish. The contractors and vendors you utilize can strengthen or weaken your program and can either cost or save you money over a period of time).

It is very important that the committee interviews and reviews contractors for all forms of preventive maintenance as well as on-going necessary repairs. Therefore, it would be beneficial to develop a set of criteria to properly select contractors (especially in trades that are subject to building, plumbing, mechanical and electrical code). The goal is to retain contractors who will come to your site when needed, be on time, provide good, honest evaluations of equipment and assets and then submit quality specifications and quotations. You may already work mainly with certain contractors; however, the parish will still have maintenance work and emergency services requiring the signing of emergency or on-going maintenance agreements/contracts. The scheduled maintenance and repair work should be placed for competitive bids. It is a good policy to make contractors aware that they will ***always*** be competing with at least two other contractors for the business. This helps keep costs low and, at the same time, obtain better service. It

is understood that you may already employ the use of certain contractors and/or vendors, and that in many instances these companies may come from within your own parish. This is a policy that you might want to closely examine. You should certainly continue using them if they provide quality services or goods, and if they are a true benefit to your parish and ministries; but they should be held to industry standards.

The following is a suggested list of criteria to be used:

- Insurance (General liability and Workman's Comp, Vehicle) – Keep updated and on file
- Age of business – would suggest ten years or longer (It is important to show stability and longevity for your contractors and vendors.)
- Business names Dba, legal, and if business operates under any other names or licenses
- Bondable
- Trade associations
- Better Business Bureau
- Copies of trade licenses (where applicable)
- Average longevity of employees (verify)
- Trade references (vendors, creditors, etc)
- Job references – Insist that names of clients that have had complaints be included in references – call them all.
- Drug/alcohol policy -(It would be helpful if the contractor has an active drug/alcohol policy in place.)
- Number of crews (This may become important in the event of emergencies.)
- Emergency procedures - Find out if they have a written policy for their personnel in the event of an emergency (electrical shock, burns, chemical spills, etc.).
- Safety record
- Safety programs attended (principals and workers) - Do they attend regular on-going classes or seminars for safety?
- Size of business, employees and last year Gross Income (verify if possible) – This item will help determine if the company is large enough and sound enough to complete your needs now and in the future
- If possible, determine labor rates, mark up, truck charges, other charges that might appear on invoice after service is complete.
- Concessions – Determine which, (if any) concessions the company is willing to make because we are a non-profit church. This step must always be performed ***after*** the above listed *labor rates, truck charges, etc. are established.*
- Background information on owner/principal of business
- Background information on their staff, including copies of current drivers licenses

PREVENTIVE MAINTENANCE CONTRACTS

Preventive maintenance contracts should be secured especially within the scope of trades where licenses are required or where the maintenance and care of a system could pose a danger to personnel. You should have screened three contractors for each type of system (roofing, electrical, plumbing, HVAC, etc). Where applicable, select one contractor per trade to provide you with a preventive maintenance proposal. There are certain systems that require by law or certification that annual or semi annual inspections are performed (fire safety system, fire suppression systems). You should secure these agreements first (if you don't already have a contract in place). Issues such as electrical, plumbing and roofing should have annual inspections with assessments performed by skilled professionals. Pest control and HVAC should have definite preventive maintenance plans in place as soon as possible and documenting forms should be used. Remember, although you will have contracts for preventive maintenance in place, each contractor should be made aware that he or she will ***have*** to go through a bidding process in the event of new equipment installation, emergency repairs, extraordinary issues.

WRITTEN PLAN FOR REPAIRS AND REPLACEMENT AND CAPITAL RENEWAL

It is very important that your committee develops good records and administers a **Systems and Equipment Repair and Replacement Plan**. This plan should be for short, medium and long term (things that require attention within one year, three to five years and ten years). This plan should be coordinated with a **Parish Campus Buildings Audit** as well as short and long term budgets, as outlined.

"Then they entrusted it to the men appointed to supervise the work on the Lord's temple. These men paid the workers who repaired and restored the temple."

2 Chron. 34:10

SYSTEMS IDENTIFICATION

- **Identification of Systems**
  Accumulation of Baseline Information

  Systems

    Sub-systems

IDENTIFICATION OF SYSTEMS

Identify and catalog all systems serving the parish, building by building: (roof, building envelope, plumbing, electrical, HVAC, etc) This identification process will be the basis for your program records. Once you have obtained identification of all your systems, it will lead you to the next logical step in your preventive maintenance program.

ACCUMULATION OF BASELINE INFORMATION:

The Preventive Maintenance Committee should accumulate and store baseline information including but not limited to the following:

- Age, condition and useful life-cycle estimates of systems and equipment
- Type of equipment and normal use (purpose)
- Name tag on equipment (how the church identifies a particular piece of equipment)
- Brand
- Model Number
- Serial Number
- Date placed into service (if possible)
- Warranty information
- Contractor or vendor who built or installed the system
- Record crucial service information on each system (amp draw, temperature differentials, relative humidity levels, refrigerant pressures, etc.) during designated preventive maintenance service dates. Interact with the maintenance staff at the parish to assure that contractors are correctly performing the prescribed services as required (testing, filter changes, water heater maintenance, boiler inspections and maintenance, etc)

SYSTEMS

The following is a list of systems for each building that will be under the guidance of the Preventive Maintenance Committee. Each system should be placed in a general category and listed as the responsibility of a particular committee member. You and your committee can divide the various systems into groups for which each committee member will be responsible. You and your committee can divide the various systems into groups for which each committee member will be responsible.

- Roof
- HVAC
- Plumbing
- Electrical
- Building exterior
- Building interior
- Fire suppression systems
- Fire/smoke alarm systems

- Controls (HVAC, lighting, sound, etc.)
- Grounds
- Pest Management
- Environmental

SUB-SYSTEMS

Each of the main systems has by nature a sub-system. The following is a list of sub-systems:

ROOF:

- Surface
- Edging
- Roof drains
- Scuppers
- Gutters & Downspouts
- Terminal Drains
- Roof Access
- Penetrations
- Repairs & Patching

HVAC:

- General
- Filters
- Condensing Units (Outdoor Section)
- Furnaces/Air Handling Equipment
- Refrigerant Piping
- Chillers
- Pumps
- Water towers
- Refrigerated walk-in coolers and/or freezers
- Ice Machines
- Air curtains
- Indoor air quality testing, monitoring
- Ventilation
- Kitchen grease vapor exhaust systems (where applicable)
- Bathroom, and misc. exhaust systems

CONTROLS:

- Building automation systems
- HVAC controls (local and remote)
- Lighting controls
- Sound systems
- Carillon/Organ

PLUMBING:

- Boilers
- Water heaters
- Gas lines (integrity and pressure)
- Drains
- Pumps
- Toilets, urinals, sinks and all related fixtures
- Fonts and font heaters
- Pressure testing

ELECTRICAL:

- Main service, service head
- Electrical lines
- Lighting
- Lightning and ground protection
- Switches, outlets and breakers
- Fault and surge protection
- Testing
- Load calculations (where necessary)
- Thermography (where necessary)

BUILDING EXTERIOR:

- Foundations
- Walls (Brick, mortar, stucco, metal, wood, etc.)
- Windows (glass integrity and seal)
- Walkways and covers
- Lighting
- Trim
- Signs
- Doors, screens
- Painting and coatings
- Seals and caulking
- Parking lot

BUILDING INTERIOR:

- Ceiling acoustical tile
- Walls
- Floors(carpet, tile, cleaning, repairs)
- Woodwork and trim
- Glass
- Doors
- Fixtures

- Lighting
- Signs
- Paintings and coatings
- Seals and caulking
- Insulation

FIRE SUPPRESSION SYSTEMS:

- Fire extinguishers
- Fire pumps
- Fire hose
- Fire hose cabinets
- Sprinklers

FIRE/SMOKE ALARMS:

- Fire alarm panels
- Fire alarm controls
- Smoke detection systems
- Annunciators

GROUNDS:

- Landscaping
- Lawns
- Irrigation systems (where applicable)
- Lawn and landscape equipment (where applicable)
- Clean up
- Maintenance and pruning
- Site drainage

PEST MANAGEMENT:

- Wood destroying insects
- Swarming insects
- Treatment plans

ENVIRONMENTAL:

Under some circumstances, the committee may be asked to address issues involving:

- Asbestos (testing & abatement) – relating only to maintenance or repairs
- Mold (testing and remediation) – relating only to maintenance or repairs
- Other issues relating to maintenance and repairs

You and your committee can divide the various systems into groups for which each committee member will be responsible.

You should always be vigilant regarding possible installation of asbestos and the possibility of mold within your facility. If you have plans to renovate any building on your campus, you will be required to perform environmental testing for asbestos prior to application for any type of building permit. Please call Don Senger and he will arrange for testing prior to construction. If you are planning to work in areas and need to know whether or not mold is present, call Don Senger and he will arrange for testing. However, if you have discovered asbestos on your property or suspect mold growth and are concerned regarding health issues and liabilities, you should call the Risk Management Department at the Downtown Chancery and they will arrange for asbestos or mold testing. The Construction and Preventive Maintenance Department will assist you in testing as long as it relates to construction, maintenance and/or preventive maintenance.

"The king should know that the Jews who came up to us from you have gone to Jerusalem and are rebuilding that rebellious and wicked city. They are restoring the walls and repairing the foundations."

Ezra 4:12

BUILDING AUDIT

- Building Audit Procedure

  Example of Parish Campus Building Audit

BUILDING AUDIT PROCEDURE

A very important part of the Preventive Maintenance program at your parish is the building audit. The building audit will allow the members of your preventive maintenance committee the opportunity to view and document existing conditions in each building and will give them an idea of what maintenance has been deferred (if any) and what future needs might be for each building. It is suggested that your committee meet on a Saturday and work from approximately 8:00 AM until 3:00 PM with a lunch break. If necessary meet for your audit on two successive Saturdays. You can view the buildings as a group or you can, where necessary, break into teams with each team responsible for certain buildings. Each member of the team should have a flashlight and a notepad to document all findings. Once you have completed the audit, meet with the entire committee and consolidate all notes into one comprehensive document. Identify each building and each system to include present conditions and noted necessary immediate or future repairs. You will later prepare cost estimates for all necessary repairs (present and future) and these numbers will be inserted into your on-going and future (capital renewal) budgets.

EXAMPLE OF PARISH CAMPUS BUILDINGS AUDIT

Each parish should compile "General Information" relating to the physical assets on the parish property. The following is an example of a General Information on Entire Campus Data Sheet:

I GENERAL INFORMATION ON ENTIRE CAMPUS

A. 6.2 acre campus with streets bordering Burney Road, 7th. Street, City Park, and Bayou.
B. Eleven (11) separate buildings joined by common sidewalks with overhead weather protective walkways.
C. Lawns, plants, trees, shrubs, statuary. Has underground, automatic irrigation sprinkling system.

II SPECIFIC BUILDING IDENTIFICATION AND DESCRIPTION

A. ***Church*:** Brick fascia with Oak exterior doors. 4000 square feet of floor space with high vaulted, wood faced ceiling and beams. Sanctuary includes small day chapel. Main church seats 1165 and chapel seats 100. Church is serviced by seven (7) central heating and air conditioning systems (all direct expansion) with one rooftop unit at Chapel area. Thermostatic controls consist of humidistats and standard, non-programmable thermostats. There is no type of building automation either for electrical, lighting or central heating and air conditioning systems. Roof system consists of continuous overlapped metal roof, gutters and downspouts. Front of church has a covered entrance with a small "plaza" for gathering. Current church building was erected in 1988 with major remodeling performed in 1998.

B. ***Bell Tower:*** Bell tower is a forty-foot high structure with automatic carillon bell system controlled from Sacristy of the church. Exterior of tower is stucco with trim and color to match the church. Roof system consists of continuous overlapped metal roof. Current bell tower was constructed in 1988

C. ***Old Education Building*:** The Old Education Building is a one-story structure with brick fascia. There are sixteen (16) individual classes with one Nursery, which is used for Sunday nursery duty and weekday Mother's Day Out. The Old Education Building is served by eight (8) central heating and air conditioning systems (all direct expansion) with condensing units located on the south side near walkways. Thermostatic controls consist of standard, non-programmable thermostats. There is no type of building automation for either electrical, lighting or central heating and air conditioning systems. Roof system consists of a twenty-five-- (25) year composition roof that was installed in 1989. System has gutters and downspouts. This building is served on three sides by covered walkways. Current Old Education Building was erected in 1978.

D. ***New Education Building*:** The New Education Building is a one-story structure with stucco fascia with trim and color to match existing church building. There are seven (7) classrooms with dividers to create fourteen (14) rooms if necessary. The New Education Building is served by six (6) central heating and air conditioning systems (all direct expansion) with condensing units located on the north side of the building, enclosed in a fenced mechanical yard. Thermostatic controls consist of standard, non-programmable thermostats. There is no type of building automation for either electrical, lighting or central heating and air conditioning systems. Roof system consists of a continuous overlapped metal roof, gutters and downspouts. Current New Education Building was erected in 1998.

E. ***Rectory and Church Offices***: The existing Rectory and Church Office is a one-story structure with brick fascia matching that of the Old Education Building. There are Priests Quarters suitable for four persons, an open carport for four vehicles, a small common area and kitchen. The offices consist of a reception room, reception office, Pastor's office, Deacon's Office, Conference Room, RCIA Office, Copy rooms, Supply rooms, and four general staff offices. The Rectory and Church Office are served by four (4) central heating and air conditioning systems (all direct expansion) with condensing units located on the north side of the building, enclosed in a fenced mechanical yard. Thermostatic controls consist of standard, non-programmable thermostats. There is no type of building automation for either electrical, lighting or central heating and air conditioning systems. Roof system consists of a continuous overlapped metal roof, gutters and downspouts. Current Rectory & Office Building was erected in 1972.

F. ***Youth Center, Library, Music Room Building*:** The combination Youth Center, Library and Music Room Building is a one-story structure with brick fascia matching that of the Old Education Building. The Youth Center, Library, Music Room Building is served by four (4) central heating and air conditioning systems (all direct expansion) with condensing units located on the north side of the building, enclosed in a fenced mechanical yard. Thermostatic controls consist of standard, non-

programmable thermostats. There is no type of building automation for either electrical, lighting or central heating and air conditioning systems. Roof system consists of a twenty-five-- (25) year composition roof that was installed in 1989. System has gutters and downspouts. This building is served on three sides by covered walkways. Current Youth Center, Library, Music Room Building was erected in 1978.

G. ***CCE Building***: The CCE Building is a one-story structure with brick fascia matching that of the Old Education Building. The Youth Center, Library, Music Room Building is served by four (4) central heating and air conditioning systems (all direct expansion) with condensing units located on the north, west and south sides of the building. Thermostatic controls consist of standard, non-programmable thermostats. There is no type of building automation for either electrical, lighting or central heating and air conditioning systems. Roof system consists of a twenty-five year composition roof that was installed in 1989. System has gutters and downspouts. This building is served on three sides by covered walkways. Current C.C.E. Building was erected in 1978.

H. ***Community Center***: The Community Center Building is a one-story structure with High ceilings and stucco fascia with trim and color to match existing church building. There is a large commercial type kitchen with walk in cooler and a large meeting area with high ceilings. In addition, there is a large table storage room and another smaller storage room, which houses the sound system. The Community Center Building is served by four (4) central heating and air conditioning systems (all direct expansion) with condensing units located on the west and east sides of the building, enclosed in fenced mechanical yards. Thermostatic controls consist of standard, non-programmable thermostats. There is no type of building automation for either electrical, lighting or central heating and air conditioning systems. Roof system consists of a continuous standing seam metal roof, gutters and downspouts. Current Community Center Building was erected in 1998.

I. ***Family Life/Activity Building***: The Family Life/Activity Building is a one-story structure with High ceilings and stucco fascia with trim and color to match existing church building. There is a large gymnasium area with high ceilings. In addition, there is a recreation room, small serving kitchen, meeting rooms and reception area. The Family Life/Activity Building is served by six (6) central heating and air conditioning systems (all direct expansion) with condensing units located on the west and east sides of the building, enclosed in a fenced mechanical yard. Thermostatic controls consist of standard, non-programmable thermostats. There is no type of building automation for either electrical, lighting or central heating and air conditioning systems. Roof system consists of a continuous standing seam metal roof, gutters and downspouts. The Family Life/Activity Building was erected in 2002.

INDIVIDUAL SYSTEMS AND EQUIPMENT INFORMATION

See attached data sheets for all systems and equipment information, including Brands, installation contractor, manufacture or installation dates (where possible), sizes and/or

capacities. Please note that each system and piece of equipment has an identification tag that "ties" it to a particular building and/area. This will assist the maintenance personnel in finding the equipment, logging data, and dispatching service or maintenance personnel. Also note that the individual data required on the sheets must be accumulated and recorded. Doing so will facilitate repairs and replacement and will be an aid in determining future replacement needs

"In the first month of the first year of his reign, he opened the doors of the temple of the Lord and repaired them."

2 Chron. 29:3

FREQUENCY OF INSPECTIONS AND SERVICES

- Frequency of Inspections and Services

  Scope of Services (System by System)

FREQUENCY OF INSPECTIONS AND SERVICES

ROOFS

- **Surface**: Roofs should be thoroughly inspected twice annually to assure that all components are serviceable. We suggest you use a roofing consultant or a trusted roofing contractor to perform one of these inspections (annual) to provide a professional opinion regarding the condition of all roofs, regardless of material composition. We suggest that you require a written report from the consultant or roofing company documenting roof conditions and recommendations. Your committee utilizing binoculars to perform a thorough visual inspection of your roof systems can perform the remaining inspection. The inspection performed by your committee should also be documented.
- **Edging**: All edging and flashing should be inspected annually by your consultant or roofing contractor with a second visual inspection by maintenance personnel. Document all findings and recommendations.
- **Roof Drains**: Roof drains should also be included in the twice-annual inspections. You will want your consultant or roofing contractor to test and flush all roof drains. Your maintenance personnel should flush drains quarterly as well.
- **Scuppers:** Scuppers should be checked annually by your consultant or roofing contractor with initial documentation of scupper size (area in square inches or feet) to assure proper evacuation of roof water.
- **Gutters and Downspouts**: Gutters and downspouts should also be checked annually by your consultant or roofing contractor with documentation of material integrity and proper installation. Downspouts should be flushed and cleared quarterly.
- **Terminal Drains**: If your gutter and downspout system has a terminal drain into a closed drain system, you will want to have a plumber inspect the closed drain system annually and clear any drain areas if clogged.
- **Lightning Protection:** If your roof areas have lightning protection, the roofing consultant or roofing contractor should include them in the annual inspection with a report on material condition and proper installation. Any discrepancies should be noted and immediately remedied.
- **Roof Access:** If your roof has any forms of access (manholes, fixed ladders, folding stairwells, etc.), these should also be inspected by your roofing consultant or roofing contractor on an annual basis. In addition, your maintenance personnel should inspect these areas quarterly with a report and any recommendations.
- **Penetrations:** Any and all roof penetrations should be inspected annually by your consultant or roofing contractor with full documentation of condition and recommendations. These penetrations include but are not limited to manhole penetrations, skylights, roof vents, pipes, electrical conduits, HVAC equipment, and roof drains. **It is very important that these areas be**

thoroughly checked, water tested and any discrepancies should be immediately addressed.

- **Repairs and Patching:** If your roof has had repairs or has patched areas, have your consultant or roofing contractor pay close attention to these areas. Repairs and patched areas are a likely source of roof compromise. Have these areas checked as part of your annual inspection with water testing and full documentation of condition.

HVAC

- **General**: On DX (Direct Expansion) equipment, there will be a condensing unit (outdoor section), refrigerant piping into the building and an indoor section consisting of a furnace or air handler, gas or electric utility to the indoor unit, an evaporator coil, primary and secondary drainlines and an emergency drain pan underneath the evaporator coil section. Note: Rooftop DX systems have some or all of the same components (self-contained) as a split system (Condensing unit outdoors and blower unit indoors). Each portion of this component system has individual attached equipment (safety controls, burners, heat strips, circuit boards, timers, etc.).
- **Filters**: Systems and equipment have various sizes and types of air filtration both to protect the equipment and to help keep the environment cleaner. This filtration should be changed as needed. There are several methods to determine the need for filter replacement; you can utilize magnahelic gauges to determine initial pressure drop across filters and change them when the pressure drop reaches a certain point; you can, if possible, monitor the condition of filters and change them when they reach a point of full face load; you can arbitrarily change them on a set schedule. Whichever method you use, you must pay close attention to the filtration. Keep in mind that if a filter is totally clogged and the media is closed, it will greatly reduce the airflow across the evaporator coil. With reduced airflow, there is not a proper heat exchange (removal of heat from the space). If the refrigerant is not allowed to absorb the heat and thus return to a gaseous state, a portion of the refrigerant will be returned to the condensing unit in a liquid state. Please note that the suction valves for the condensing unit are designed to accept a gas, not liquid. The liquid, if returned to the outdoor section, will cause "slugging" of the valves and greatly diminish the life span of that condensing unit.
- **Condensing Unit** (Outdoor Section): The condensing units require service two times annually. These services should be performed by a technician operating under a licensed air conditioning contractor or by maintenance personnel with adequate skill and knowledge of these systems. During the spring (suggest mid-May), the technician should follow the task sheet designed for "summer readiness check up". During the mid-summer months (suggest early to mid July), technician should check on going operations of this equipment.
- **Furnace/Air Handling Equipment**: This portion of the system should be checked quarterly as follows: Furnace should be thoroughly inspected in the late fall (suggest mid November) in preparation for winter use. Furnaces or Air Handlers with electric heat should be checked as directed in the task sheet

for "fall readiness check up". The furnace should also be checked again in mid January to assure proper operation. The blower fan, evaporator coils and drains should be checked during the summer check up and again in July.

- **Refrigerant Piping**: The refrigerant piping (smaller, liquid line and larger suction line) should be checked annually by your air conditioning service technician. The refrigerant lines should be thoroughly leak checked using electronic leak detection instrumentation. Any leaks in refrigerant lines should be documented and repaired quickly. Technician should follow the guidelines for inspections as noted on the task sheet.
- **Chillers:** The chillers (where applicable) require daily inspections (determine operating conditions, check water flows (condensing water temperatures, chilled water temperatures and flows, etc.) Carefully follow task sheets for daily, weekly, monthly, quarterly, semi-annual and annual tasks. This equipment is extremely expensive and requires close attention.
- **Compressor Oil Analysis:** Once each year, your mechanical contractor should take a sample of compressor lubricant. The results of a compressor lubricant analysis are an important part of the system's "medical" record. They should be obtained in conjunction with routine service calls (at least yearly) but more often if an opportune time presents itself). It is also a good practice to replace the oil withdrawn with fresh lubricant so the oil charge is not reduced over time. Generally, the analyses discussed are performed to identify materials that have entered the hermetically sealed systems as well as those generated internally. Over the course of a season, materials and their byproducts accumulate in the lubricant. *In other words, by having the lubricant analyzed, you are searching for moisture (water) content, acid levels, metals (iron, aluminum).* Lubricant analysis can indicate electrical or mechanical problems. These problems might not be as easy to detect as other problems. High resistance in electrical connections, such as pitted motor starter contacts, will reduce voltage at motor terminals, causing excessive current, as will overloading the compressors. *Orange to dark brown oil* is commonly caused by the presence of metal particles from compressor bearing wear or other sources. Moisture can cause *freezing* at internal points such as expansion valves and can also cause *interior corrosion*. So, as you can see, having the compressor lubricant analyzed at least once per year can be a huge benefit to your preventive maintenance program.
- **Pumps:** If your have a chilled water system, you will, at some point in the system, have one or more pumps. If you have a chilled water tower, you will have condensing unit pumps (supply and return), and chilled water pumps (primary and possibly distribution pumps). These pumps may operate in the "on" or "off" mode depending on whether or not the chiller is running, or you may have installed Frequency Drives which will control the motor speed and will "ramp" the pump motors up and down depending on need. Regardless of your particular installation, you will need to closely follow the task sheet designed for pump maintenance. Pumps should be checked daily and thoroughly inspected quarterly with documentation, reports and recommendations.
- **Water Towers:** Water Towers vary in type from the old wooden lattice type, to stainless steel to fiberglass composition. Water towers require your strict

attention and are an extremely important part of your preventive maintenance program. Proper water treatment and testing is crucial. Various types of accumulations and scale begin to build up on condensing water piping and on water tower screens and spray nozzles. Proper heat exchange (removal of heat from the system) relies heavily on clean, bare components within these systems. In addition, water towers have *motors, valves, fan housings and blades, controls, etc.*, all of which require intense preventive maintenance. The lack of such maintenance will cause a definite waste of energy and premature failure to these systems.

- **Refrigerated walk in coolers/freezers**: The installation of refrigerated walk in coolers and/or freezers typically requires similar maintenance as performed on direct expansion air conditioning systems. Component parts such as evaporator coils, fans, condensing unit coils, compressors, timing switches, freezstats, thermostats, relays, contactors, etc. are very similar to those of central air conditioning and should be closely monitored. The difference in this equipment is the loss of product in the event of a failure. It is, therefore, important that you have a refrigeration technician that is fully capable of performing the correct preventive maintenance and reporting to you the outcome and any recommendations of that maintenance.
- **Ice machines**: Ice machines, like walk in refrigerators/freezers require similar maintenance but also require testing to make sure that the ice remains potable.
- **Air Curtains**: This type of equipment may or may not be installed at your parish. Air curtains perform two functions; first, they create a "curtain" of air at outside doors of your kitchen to prevent insects (flies, gnats, etc.) from entering; second, the "curtain" of air helps to keep the indoor air conditioning or heating in the building, rather than escaping while the kitchen door is open. These systems should be examined and serviced semi-annually.
- **Kitchen Grease Vapor Exhaust Systems**: The kitchen grease vapor exhaust system (range hood), consists of a range hood with filters, an exhaust duct leading out of the building, an exhaust fan on the roof or side of the building and, usually, some type of fire suppression system. Depending on the cooking volume, grease exhaust systems should be cleaned semi-annually and, in some cases, quarterly. Cleaning should be performed on a regular basis as mentioned by a reputable contractor.You should have the fire suppression system checked quarterly and certified on an annual basis.
- **Bathroom And Other Exhaust Systems**: The exhaust systems serving bathrooms and other areas may include an unfiltered hood or grille, ductwork leading to a terminal point out of the building, roof jack and an exhaust fan located at the indoor grille or at some point outside of the building. These systems should be checked and cleaned on a semi-annual basis.
- **Ventilation:** Many buildings have a system bringing outdoor air into the building to create "fresh air" exchange for ventilation purposes. These systems, typically, consist of an outdoor louver, horizontal and/or vertical ductwork, manual or automatic damper control and, (sometimes), electronic air volume controls to bring outside air into a particular space. The amount of outdoor air is carefully calculated and is an important part of the general air balance of the building or space and, therefore, should not be changed or

altered without careful scrutiny and the "blessings" of a mechanical engineer. These systems, like the air curtain systems, should be inspected and serviced on a semi-annual basis.

- **Indoor Air Quality Testing and/or Monitoring**: There has been a tremendous amount of attention regarding indoor air quality from a testing and monitoring standpoint. Initially, when a building is constructed, the HVAC contractor will, through a certified air balance company, commission the heating, air conditioning and ventilation system(s) in the building to assure that the system is providing the amount of airflow, heating and cooling and fresh air ventilation as specified by the mechanical engineer.

CONTROLS

- ***All building automation systems, HVAC controls (local and remote), all lighting controls, sound systems; organ systems and carillon systems*** should be inspected and tested annually to assure proper operation and condition. Any repairs necessary should be performed immediately.

PLUMBING

- **Boilers**: Boilers are typically used to provide heated water for central heating. The Texas Department of Licensing and Regulation regulates the installation, care, use, inspection, repair and certification of boilers in the state of Texas. Each year, a representative of your local municipal government will inspect your boiler and you will receive a certificate. You will then receive an invoice via the Diocese of Galveston-Houston from the State. Typically, the invoice is $90.00, which pays the fee for your certification of your boiler. In the event that the invoice is ignored or unpaid, you will be given one or two more opportunities to remit the payment. If, after a thirty (30) and/or sixty (60) day notice is still unanswered, you will be fined for a minimum of $1,000.00 in addition to the original $90.00 Certification Fee. **It is, therefore, very important that you pay close attention to the $90.00 Certification fee and pay it promptly to avoid other, more costly, charges.** The Diocese of Galveston-Houston will adhere to the following protocol regarding the receipt and forwarding of all Boiler Certification Invoices from Texas Department of Licensing and Regulation:

  When the ***invoice*** for your parish is received at the Diocese, the Parish Preventive Maintenance Manager will: (1) Make a copy of the invoice for departmental files. (2) Return the original invoice to your parish in care of the Parish Administrator or, in the event there is no Parish Administrator, to the Parish Secretary. (3) Forward instructions regarding procedure to be followed in processing the invoice, and a request for the parish to provide the Manager with a copy of the check for payment. ***Please note***: It is the sole responsibility of the parish to process the invoice, remit to the Texas

Department of Licensing and Regulation, and provide a copy of the remittance to the Construction/Preventive Maintenance Department.

- **Water Heaters:** Water heaters provide domestic hot water for your parish in various buildings. Water heaters should be drained each six- (6) months in an effort to reduce the amount of scale and mineral build up within the tank.

- **Gas Lines:** Integrity and pressure is of extreme importance regarding natural gas lines that service your parish. Any time, during remodeling, gas lines are disturbed or moved or modified or if any gas appliances such as stoves, water heaters, gas furnaces, fireplaces, etc. are added, you should have a licensed plumber inspect the gas lines and perform a line pressure test (for pressure and leaks) with *certification*. City inspectors will, almost always, require the inspection and pressure test.

- **Drains:** You should perform an annual test on all drains to assure they are clear. Drain grates should be cleaned and kept free of debris at all times. This requires a visual inspection at least weekly. If the drain has a "collection box" below it, the grate should periodically be removed and the debris removed from the collection area. Once the cleaning is complete, you should, properly, re-attach the grill grate. If drains present consistent problems, (slowness in draining, clogs, back-ups, etc.), it would be wise to consult with a plumber to determine if further, in-depth, inspections of drain lines are warranted.

- **Pumps**: Pumps should be maintained as instructed by the manufacturer. This maintenance includes, but is not limited to, checking the pump for vibration and flow. **Note:** If your location has pumps for chilled or condensing water distribution, sumps, boilers, etc., it is best that you use the preventive maintenance services of a qualified vendor, unless you are well experienced in true pump care.

- **Toilets, Urinals and Sinks**: You should perform a daily walk through of your property and visually inspect all toilets, urinals and sinks. This is particularly advisable where children are present (nursery, cry room bathrooms, classrooms). Check sink, toilet and urinal drains for clogs and proper operation.

- **Fonts and Font Heaters**: If the parish baptismal font has mechanical operation (water lines, pumps, heaters, etc), you should perform semi-annual preventive maintenance on each component. Use standard procedures as outlined above for similar types of equipment.

- **Pressure Testing:** In areas where you have consistent problems with water pressure, you should perform a water flow test and possibly have a licensed plumber perform a pressure test on each line. This will provide assurance that the line pressure is adequate or will confirm that it isn't. This should only be done in the event that there are issues with the line pressure that you cannot solved during normal maintenance.

ELECTRICAL

The electrical system serving your parish is a complex network and should be carefully maintained for safety and proper operation. The electrical system is made up of components that are extremely dangerous and can be life threatening. Only skilled, licensed electricians should work on your electrical system. Utilize the electrician to perform the scheduled tasks as noted on Sheet S-1.

BUILDING EXTERIOR

- **Foundation**: You should perform visual inspections of the foundations for all your buildings one time monthly. However, you should perform a more in-depth inspection one time yearly. In the event that signs of foundation failure (large cracks in the foundation itself, cracks on brick, separation of building components such as sheetrock or plaster), it is highly advisable that you (1) contact the Parish Preventive Maintenance Manager and (2) prepare to work with a structural engineering firm to determine exactly what the problem is and what needs to be accomplished to remedy the issue.

- **Walls**: You should walk your property daily to visually inspect the exterior wall system. The materials used for wall construction vary, (brick fascia, stucco, etc.). Regardless of the materials used, you should be aware of any situations where structural damage has occurred or may occur. In the event that signs of failure (large cracks in the wall itself, cracks on brick, separation of building components such as sheetrock or plaster), it is highly advisable that you (1) contact the Parish Preventive Maintenance Manager and (2) prepare to work with a structural engineering firm to determine exactly what the problem is and what needs to be accomplished to remedy the issue.

- **Windows (glass integrity and seals):** During your daily property walk through, you should visually inspect your fenestration (windows) and glass doors. Check for cracks, breakage, holes and chips as well as problems with window sealant such as caulking, glazing seals, etc.) You should, immediately, repair any damage or breakage to windows or seals to prevent water from entering the building at these points.

- **Walkways and Covers:** During your daily property walk through, note the condition of all walkways. Check for sidewalk cracks, uneven surfaces, holes, obstructions, etc., that may present trip or fall hazards. If you have any questions regarding your walkways or any other areas that may present hazards, call the Risk Management Department at the Diocese of Galveston-Houston for instructions. Covers should be examined during your daily walk through. Depending on the construction materials, you should look for rotted support beams, water damage, rust on support beams, chipped or worn paint, separation of materials, wind or rain damage, holes, rips, separated seams, etc. If the walkway covers have gutters, drains or downspouts, these should be

checked and kept clear. **Any damages found or repairs needed should be addressed quickly.**

- **Lighting**: You will have to check the property's entire exterior lighting (on buildings, parking areas, accent lighting, etc.), assure that all components are in good condition, protected from the weather, and operational. (This may require that you test the lighting during the day and possibly in the evening to confirm proper functioning.) All mounting brackets and light poles should be checked and any discrepancies noted and remedied.

- **Trim**: Trim areas around doors, windows and, in some cases, decorative trim should be part of the daily visual inspection. In the event that you find trim that is damaged or separated from the building, you should either properly repair it yourself or, contact the proper contractor to accomplish the repairs or replacement.

- **Doors:** All exterior doors should be checked monthly for proper operation and integrity. All door hardware should be inspected monthly and checked for proper operation and condition. Hinge systems and weather stripping should also be checked. Coatings and finishes should be inspected and properly maintained on a yearly basis. This will probably include a cleaning and light finishing to the coatings on each exterior door. This is particularly important regarding exterior doors that are not protected from the weather.

- **Paintings and Coatings**: All painting and coatings should be inspected annually and evaluated at that time. You should have a definite written plan for re-painting and coating the surfaces. Your plan should include the proper preparation for painting and coating.

- **Seals and Caulking:** The buildings at the parish will have various areas that are sealed with types of sealant and caulking. These areas are of extreme importance because, if they are failed, they will be the areas where moisture can enter the building envelope. You should visually inspect all of the sealant and caulking for all the buildings during your daily walk through. Any areas where the sealant or caulking is old, dried, cracked, etc., should be immediately addressed. If the damage is large enough, you should consult with a commercial waterproofing company to keep the building envelope intact.

- **Parking:** Watch the parish parking areas to confirm that you have a decent traffic flow, especially during the time prior to and just after all masses. Be sure that all parking areas are properly marked with stripping and that handicap areas are properly located and marked. Be sure that the surface of the parking areas are in good repair and that any low areas are noted and steps taken to preserve the surface and to address the low spots where water pools. ***Check and clear surface drains.*** It might be prudent to visit the site after a rain (especially a heavy rain) to determine the flow and drainage of the parking area. If there is a problem with drainage or flow, it would be a good

idea to take photos of the area to illustrate drainage conditions. Be sure that fire zones are properly marked and clear.

- **Signs:** You should physically inspect all signs at your facility for wear and tear, rusting, wood rot, cleanliness, "readability" and, where applicable, electrical and/or lighting condition. Assess your property and assure that all signs can ***be easily read and interpreted and that all areas are clearly marked.***

BUILDING INTERIOR

- **Building Envelope:** The total building envelope includes the roofing system, eaves, walls, windows and any other portions of the overall system that might allow air or moisture to pass into the building. The roofing portion of the building envelope should be checked annually by a qualified roof-consulting firm to determine the integrity of the system and to further determine the "life cycle" of the system. Your committee should thoroughly inspect the mortar, sealant, caulking, door facing trim, and all other areas that might provide an entrance point for air or moisture. If any of the above listed components show signs of decomposition, failure, separation or repairs, you should make note of the discrepancies and immediately take the proper steps to remedy the problem.

- **Ceilings**: All of the ceilings that serve your buildings should be inspected annually. You should look for visual signs of aging and failure. Plaster ceilings should be closely checked for cracks or separation. Acoustical ceilings should be checked for cracks, breaks, moisture, stains, holes, etc. You should look for any signs of deterioration. Beamed (wood) ceilings should be checked and properly maintained to keep the integrity of the system in tact.

- **Walls**: All walls and partitions should be visually checked on an annual basis. Look for visual signs of cracks, or separation. Large cracks may indicate critical problems (foundation) and should be investigated and any problems should be immediately addressed.

- **Floors**: The floors should be part of your annual inspection. Check the physical condition of tile, carpet, hardwood, etc. Check for wear and tear as well as broken tiles, ripped or worn carpet, and/or uneven hardwood. Make a note of any discrepancies and remedy the situation as soon as possible.

- **Woodwork & Trim**: You should visually inspect the woodwork and trim looking for signs of cracking, damage, rot or wear and tear. Be sure to address any needed repairs to prevent damage from spreading.

- **Glass:** All glass (windows, doors with windows, cube glass and skylights) should be inspected annually for cracks, breakage, loss or deterioration of

seals. Any repairs or replacements necessary should be performed immediately to protect the building envelope.

- **Doors**: All doors, whether solid core, hollow core, metal, glass, etc. should be inspected every six months for proper alignment, cracks, de-lamination, breakage, hardware problems, etc. Any repairs or replacement should be performed immediately.

- **Fixtures**: Examine all fixtures and repair or replace as needed.

- **Lighting**: Examine all fixtures on an annual basis. Look for damage as well as fixtures that are not operating. Check fixtures for frayed wires, loose wire nuts, damaged reflectors, ballast operation, switching, etc. Repair or replace immediately where necessary.

- **Paintings & Coatings:** All areas should be inspected annually to determine the condition of all paintings and coatings for walls, woodworking, trim and doors. Be sure to keep paintings and coatings in good condition.

- **Seals and Caulking:** Seals and caulking should be examined every six months to determine condition. Any seals or caulking can greatly affect the integrity of your building and will help protect the building envelope. If seals and/or caulking show signs of wear, separation, cracking or other damage, they should be replaced immediately with the proper material.

- **Insulation (Wall and Ceiling):** Inspect the insulation in walls (where possible) and ceiling areas. Visually inspect to assure that the insulation vapor barrier is properly faced. If the insulation is "blown in" make sure that it hasn't settled to the point where the R-Value is lost. If any insulation is found to be wet, determine the cause of the moisture and make necessary repairs or corrections, replace that portion of the insulation immediately.

FIRE SUPPRESSION SYSTEMS

All fire extinguishers, fire pumps, fire hoses and cabinets and all sprinkler systems must be inspected annually by a qualified company and certified for proper operation. All service to these systems will be performed by outside sources in compliance with all city, county, state and/or federal codes and regulations. If you are not familiar with the regulating ordinances, make sure you investigate the ordinances and be sure to comply with them.

FIRE/SMOKE ALARMS

All fire and smoke alarms must be inspected annually by a qualified company and certified for proper operation. All service to these systems will be performed by outside sources in compliance with all city, county, state and/or federal codes and regulations. If you are not familiar with the regulating

ordinances, make sure you investigate the ordinances and be sure to comply with them.

GROUNDS

Landscaping, lawns, irrigation systems and clean- up should all be tended on a weekly basis. You have the ability to contract your grounds services, perform them with your personnel or a combination of both. Your ground maintenance equipment should be serviced and inspected according to manufacturer's specification on a semi-annual basis.

Pest Management

You should contract a ***qualified pest control company*** to either rid your campus of pests (wood destroying or swarming insects) and/or to provide periodical pest management services. Once your campus is pest free, you should enter a pest prevention contract with a qualified pest control company.

Environmental

Other areas such as ***asbestos and/or lead based paint testing, abatement, encapsulation and air- monitoring*** may become necessary during repair or remodeling projects. You will be required, prior to obtaining a building permit, to test for the presence of asbestos containing materials (ACM) and/or lead based paint in the area that will be remodeled. A qualified, licensed consulting company must perform the testing. The Manager, Parish Preventive Maintenance will assist you in the testing for ACM's and/or lead based paint prior to any demolition work or remodeling. If you suspect the presence of ACM's, lead based paint or mold in your facility and are concerned regarding the safety and health of building occupants, call the Risk Management Office at the Diocese of Galveston-Houston for further instruction.

SYSTEMS AND EQUIPMENT SPECIFIC TASKS

The performance of individual tasks directly relating to specific systems and/or equipment is of utmost importance. Your comprehensive preventive maintenance program relies heavily on well-documented maintenance data. This data will be utilized over the years to determine if and when a system or piece of equipment shall be replaced. It records several cycles of maintenance on the system or equipment and will begin to show wear and tear, both normal and premature. It is also very important that you develop a sound schedule system for all maintenance. The schedule of services and tasks can be manual or, if you prefer, computer driven. It is strongly suggested that you utilize a computer database, if possible, due to the vast amount of information gathered on systems and equipment.

SCHEDULE OF INSPECTIONS AND SERVICES

You will need to establish a comprehensive schedule for all preventive maintenance and services. You should incorporate your equipment and systems replacement plan into this schedule. The recommended schedule for inspections and service of all systems and sub-systems is on Sheet S-1 which is attached to this manual. If you develop a thorough inspection plan and follow the routine, you will identify issues which may be small at this time but can develop into major problems later.

Included in this manual are several system and equipment specific task sheets outlining important information necessary to continually evaluate systems and equipment performance as well as to provide proper preventive maintenance. You may wish to add to the task sheets to suit your own campus and plant, however, we do not suggest that you eliminate any of the items already on each task sheet.

IMPLEMENTATION

Your committee should develop and adhere to a logical plan for implementing your preventive maintenance program. Your plan would require good, open communication with your Pastor, Pastoral Council, Buildings planning Committee, and the Parish Finance Committee. It will be your responsibility to monitor the budget for preventive maintenance and repairs as well as the budget for capital renewal. Don Senger will also meet with you to audit the budget and assist your committee. In addition, all requests for withdrawals from capital renewal accounts will have to have the approval of Don Senger. You should also have provisions in your plan to work closely with maintenance and grounds personnel in your parish. Remember to include your pastor to the extent that he wishes.

"He called together the priests and Levites and said to them, 'Go to the towns of Judah and collect the money due annually from all Israel, to repair the temple of your God. Do it now.' But the Levites did not act at once."

2 Chron. 24:5

BUDGETS

PREVENTIVE MAINTENANCE

All of the "step by step" sections of this manual Forming Your Committee, Systems Identification, Building Audit, Frequency of Services have led you to this point. By utilizing each of these sections, you have created a Preventive Maintenance Program and a "Scope of Work" which can now be priced, resulting in your annual Preventive Maintenance Budget.

- **Example Spreadsheets**

CAPITAL RENEWAL

It is very important that your committee develops good records and administers a systems and equipment repair and/or replacement plan. This plan should be for short, medium and long term (things that require attention within one year, three to five years and ten years). This plan should be coordinated with the capital renewal budget.

"Which of you wishing to construct a tower does not first sit down and calculate the cost to see if there is enough for its completion? Otherwise, after laying the foundation and finding himself unable to finish the work the onlookers should laugh at him and say, 'This one began to build but did not have the resources to finish.' "

Luke 14: 28-30

PARISH ACTIVITY CENTER

INSPECTION DATE: 5/15/03

Item#	Floor	Component	Condition	Notes	Life Exp. In Years	Est. Cost	Annual Maint Budget	Annual Cap Renew Budget
1	N/A	Roof	Excellent	Tremco Insp. Rept. 7/15/03	15	$ 45,000.00	$ 180.00	$ 3,300.00
2	N/A	Ext. Walls	Excellent	Tremco Insp. Rept 7/15/03, Caulk Windows in 2 yrs	2	$ 3,600.00		$ 1,980.00
3	1	ACCU#1	Excellent	Trane: Installed 6/15/02	12	$ 3,400.00		$ 311.67
4	1	ACCU#2	Excellent	Trane: Installed 6/15/02	12	$ 3,400.00		$ 311.67
5	1	ACCU#3	Excellent	Trane: Installed 6/15/02	12	$ 3,400.00		$ 311.67
6	1	ACCU#4	Excellent	Trane: Installed 6/15/02	12	$ 3,400.00		$ 311.67
7	1	AHU#1	Excellent	Trane: Installed 6/15/02	10	$ 2,800.00		$ 308.00
8	1	AHU#2	Excellent	Trane: Installed 6/15/02	10	$ 2,800.00		$ 308.00
9	1	AHU#3	Excellent	Trane: Installed 6/15/02	10	$ 2,800.00		$ 308.00
10	1	AHU#4	Excellent	Trane: Installed 6/15/02	10	$ 2,800.00		$ 308.00
11	1	Vinyl Tile Flr	Excellent	Installed 6/15/02	10	$ 18,000.00		$ 1,980.00
12	1	Sports Flr	Excellent	Installed 6/15/02	20	$ 45,000.00		$ 2,475.00
13	1	Walls, Paint	Excellent	Painted 7/01/02	5	$ 18,000.00	$ 1,000.00	$ 3,960.00
14	1	Carpet	Excellent	Installed 6/15/02	8	$ 16,000.00	$ 500.00	$ 2,200.00
15	1	Light Fixt	Excellent	Installed 6/15/02	20	$ 17,500.00	$ 300.00	$ 962.50
16	1	Windows	Excellent	Installed 6/01/02	20	$ 22,000.00		$ 1,210.00
17	1	Fire Ext Sys	Excellent	Installed 5/01/02	30	$ 65,000.00	$ 1,800.00	$ 2,383.33
18	1	Fire Alarms	Excellent	Installed 5/01/02	30	$ 55,000.00	$ 500.00	$ 2,016.67
19	N/A	N/A	N/A	**Sub-Totals**			**$ 4,280.00**	**$ 24,946.17**
20	N/A	N/A	N/A	***Misc. Costs base on 10% of Budgeted Items***			***$ 428.00***	***$ 2,494.62***
21	N/A	N/A	N/A	**Total Budget - This Building**			**$ 4,708.00**	**$ 27,440.78**

C.C.E. BUILDING

INSPECTION DATE: 5/15/03

Item#	Floor	Component	Condition	Notes	Life Exp. In Years	Est. Cost	Annual Maint Budget	Annual Cap Renew Budget
1	N/A	Roof	Good	Tremco Insp. Rept. 7/15/03	4	$24,000.00	$ 100.00	$ 6,600.00
2	N/A	Ext. Walls	Excellent	Tremco Insp. Rept 7/15/03	10	$15,000.00		$ 1,650.00
3	1	ACCU#5	Fair	York: Installed 4/17/1995	12	$ 1,700.00		$ 155.83
4	1	ACCU#6	Fair	York: Installed 9/02/1999	12	$ 1,900.00		$ 174.17
5	1	ACCU#7	Fair	Carrier: Installed 6/15/03	12	$ 2,100.00		$ 192.50
6	1	ACCU#8	Excellent	Trane: Installed 6/15/03	12	$ 2,300.00		$ 210.83
7	1	AHU#5	Fair	Rheem: Installed 5/14/1996	10	$ 1,400.00		$ 154.00
8	1	AHU#6	Fair	York: Installed 6/15/01	12	$ 1,800.00		$ 165.00
9	1	AHU#7	Fair	Trane: Installed 9/15/1996	10	$ 1,300.00		$ 143.00
10	1	AHU#8	Excellent	Trane: Installed 9/18/1996	10	$ 1,300.00		$ 143.00
11	1	Vinyl Tile Flr	Good	Installed 7/03/1992	10	$ 9,000.00		$ 990.00
12	1	Ceramic Tile	Excellent	Installed 7/03/1992	25	$ 2,000.00		$ 88.00
13	1	Walls, Paint	Excellent	Painted 7/01/02	5	$ 6,000.00	$ 1,000.00	$ 1,320.00
14	1	Carpet	Excellent	Installed 6/15/02	8	$ 5,000.00	$ 500.00	$ 687.50
15	1	Light Fixt	Excellent	Installed11/04/1996	20	$ 4,500.00	$ 300.00	$ 247.50
16	1	Windows	Excellent	Installed 6/15/1987	20	$12,000.00		$ 660.00
17	1	Fire Ext Sys	Excellent	Installed 5/01/02	30	$28,000.00	$ 1,800.00	$ 1,026.67
18	1	Fire Alarms	Excellent	Installed 5/01/02	30	$36,000.00	$ 500.00	$ 1,320.00
19	N/A	N/A	N/A	**Sub-Totals**			**$ 4,200.00**	**$ 15,928.00**
20	N/A	N/A	N/A	***Misc. Costs base on 10% of Budgeted Items***			***$ 420.00***	***$ 1,592.80***
21	N/A	N/A	N/A	**Total Budget - This Building**			**$ 4,620.00**	**$ 17,520.80**

OLD CLASSROOM BUILDING

INSPECTION DATE: 5/15/03

Item#	Floor	Component	Condition	Notes	Life Exp. In Years	Est. Cost	Annual Maint Budget	Annual Cap Renew Budget
1	N/A	Roof	Good	Tremco Insp. Rept. 7/15/03	5	$ 12,000.00	$ 180.00	$ 2,640.00
2	N/A	Ext. Walls	Excellent	Tremco Insp. Rept 7/15/03, Caulk Windows in 2 yrs	2	$ 3,600.00		$ 1,980.00
3	1	ACCU#1	Fair	York	2	$ 1,600.00		$ 880.00
4	1	ACCU#2	Fair	York	2	$ 1,600.00		$ 880.00
5	1	ACCU#3	Fair	York	2	$ 1,600.00		$ 880.00
6	1	ACCU#4	Fair	York	2	$ 1,600.00		$ 880.00
7	1	ACCU#5	Fair	York	2	$ 1,600.00		$ 880.00
8	1	ACCU#6	Fair	York	2	$ 1,600.00		$ 880.00
9	1	ACCU#7	Fair	York	2	$ 1,600.00		$ 880.00
10	1	ACCU#8	Fair	York	2	$ 1,600.00		$ 880.00
11	1	AHU#1	Fair	York	2	$ 1,200.00		$ 660.00
12	1	AHU#2	Fair	York	2	$ 1,200.00		$ 660.00
13	1	AHU#3	Fair	York	2	$ 1,200.00		$ 660.00
14	1	AHU#4	Fair	York	2	$ 1,200.00		$ 660.00
15	1	AHU#5	Fair	York	2	$ 1,200.00		$ 660.00
16	1	AHU#6	Fair	York	2	$ 1,200.00		$ 660.00
17	1	AHU#7	Fair	York	2	$ 1,200.00		$ 660.00
18	1	AHU#8	Fair	York	2	$ 1,200.00		$ 660.00
19	1	Vinyl Tile Flr	Excellent	Installed ?	10	$ 9,800.00		$ 1,078.00
20	1	Accoustical Ceiling	Excellent	Installed ?	20	$ 18,000.00		$ 990.00
21	1	Walls, Paint	Excellent	Painted 7/01/02	5	$ 8,000.00	$ 1,000.00	$ 1,760.00
22	1	Carpet	Excellent	Installed ?	8	$ 900.00	$ 500.00	$ 123.75
23	1	Light Fixt	Excellent	Installed ?	20	$ 12,000.00	$ 300.00	$ 660.00
24	1	Windows	Excellent	Installed ?	20	$ 9,000.00		$ 495.00
25	1	Fire Ext Sys	Excellent	Installed ?	30	$ 30,000.00	$ 1,800.00	$ 1,100.00
26	1	Fire Alarms	Excellent	Installed ?	30	$ 20,000.00	$ 500.00	$ 733.33
27	N/A	N/A	N/A	**Sub-Totals**			**$ 4,280.00**	**$ 23,880.08**
28	N/A	N/A	N/A	***Misc. Costs base on 10% of Budgeted Items***			***$ 428.00***	***$ 2,388.01***
29	N/A	N/A	N/A	**Total Budget - This Building**			**$ 4,708.00**	**$ 26,268.09**

NEW CLASSROOM BUILDING

INSPECTION DATE: 5/15/03

Item#	Floor	Component	Condition	Notes	Life Exp. In Years	Est. Cost	Annual Maint Budget	Annual Cap Renew Budget
1	N/A	Roof	Excellent	Tremco Insp. Rept. 7/15/03	15	$ 19,500.00		$ 1,430.00
2	N/A	Ext. Walls	Excellent	Tremco Insp. Rept 7/15/03, On-Going Paint	2	$ 4,500.00	$ 2,000.00	$ 2,475.00
3	1	ACCU#1	Excellent	Trane: Installed 6/15/99	12	$ 2,300.00		$ 210.83
4	1	ACCU#2	Excellent	Trane: Installed 6/15/99	12	$ 2,300.00		$ 210.83
5	1	ACCU#3	Excellent	Trane: Installed 6/15/99	12	$ 2,300.00		$ 210.83
6	1	ACCU#4	Excellent	Trane: Installed 6/15/99	12	$ 2,300.00		$ 210.83
7	1	ACCU#5	Excellent	Trane: Installed 6/15/99	12	$ 2,300.00		$ 210.83
8	1	AHU#1	Excellent	Trane: Installed 6/15/99	10	$ 1,800.00		$ 198.00
9	1	AHU#2	Excellent	Trane: Installed 6/15/99	10	$ 1,800.00		$ 198.00
10	1	AHU#3	Excellent	Trane: Installed 6/15/99	10	$ 1,800.00		$ 198.00
11	1	AHU#4	Excellent	Trane: Installed 6/15/99	10	$ 1,800.00		$ 198.00
12	1	AHU#5	Excellent	Trane: Installed 6/15/99	10	$ 1,800.00		$ 198.00
13	1	Exhausts	Excellent	Installed 6/15/99	10	$ 4,200.00		$ 462.00
14	1	Vinyl Tile Flr	Excellent	Installed 6/15/99	20	$ 16,000.00		$ 880.00
15	1	Walls, Paint	Excellent	Painted 7/01/02	5	$ 12,000.00	$ 1,000.00	$ 2,640.00
16	1	Carpet	Excellent	Installed 6/15/99	8	$ 8,000.00	$ 500.00	$ 1,100.00
17	1	Light Fixt	Excellent	Installed 6/15/99	20	$ 8,500.00	$ 300.00	$ 467.50
18	1	Windows	Excellent	Installed 6/01/99	20	$ 16,500.00		$ 907.50
19	1	Fire Ext Sys	Excellent	Installed 5/01/99	30	$ 40,000.00	$ 1,800.00	$ 1,466.67
20	1	Fire Alarms	Excellent	Installed 5/01/99	30	$ 28,000.00	$ 500.00	$ 1,026.67
21	N/A	N/A	N/A	**Sub-Totals**			**$ 6,100.00**	**$ 14,899.50**
22	N/A	N/A	N/A	***Misc. Costs base on 10% of Budgeted Items***			***$ 610.00***	***$ 1,489.95***
23	N/A	N/A	N/A	**Total Budget - This Building**			**$ 6,710.00**	**$ 16,389.45**

COMMUNITY CENTER

INSPECTION DATE: 5/15/03

Item#	Floor	Component	Condition	Notes	Life Exp. In Years	Est. Cost	Annual Maint Budget	Annual Cap Renew Budget
1	N/A	Roof	Excellent	Tremco Insp. Rept. 7/15/03	15	$ 52,000.00	$ 180.00	$ 3,813.33
2	N/A	Ext. Walls	Excellent	Tremco Insp. Rept 7/15/03	2	$ 3,600.00		$ 1,980.00
3	1	ACCU#1	Excellent	Trane: Installed 7/15/98	12	$ 4,800.00		$ 440.00
4	1	ACCU#2	Excellent	Trane: Installed 7/15/98	12	$ 4,800.00		$ 440.00
5	1	ACCU#3	Excellent	Trane: Installed 7/15/98	12	$ 4,800.00		$ 440.00
6	1	ACCU#4	Excellent	Trane: Installed 7/15/98	12	$ 4,800.00		$ 440.00
7	1	AHU#1	Excellent	Trane: Installed 7/15/98	10	$ 3,700.00		$ 407.00
8	1	AHU#2	Excellent	Trane: Installed 7/15/98	10	$ 3,700.00		$ 407.00
9	1	AHU#3	Excellent	Trane: Installed 7/15/98	10	$ 3,700.00		$ 407.00
10	1	AHU#4	Excellent	Trane: Installed 7/15/98	10	$ 3,700.00		$ 407.00
11	1	Vinyl Tile Flr	Excellent	Installed 7/15/98	10	$ 12,800.00		$ 1,408.00
12	1	Walls, Paint	Excellent	Painted 7/01/02	5	$ 9,750.00	$ 1,000.00	$ 2,145.00
13	1	Light Fixt	Excellent	Installed 7/15/98	20	$ 17,500.00	$ 300.00	$ 962.50
14	1	Windows	Excellent	Installed 7/15/98	20	$ 22,000.00		$ 1,210.00
15	1	Fire Ext Sys	Excellent	Installed 7/15/98	30	$ 42,000.00	$ 1,800.00	$ 1,540.00
16	1	Fire Alarms	Excellent	Installed 7/15/98	30	$ 31,000.00	$ 500.00	$ 1,136.67
17	N/A	N/A	N/A	**Sub-Totals**			**$ 3,780.00**	**$ 17,583.50**
18	N/A	N/A	N/A	***Misc. Costs base on 10% of Budgeted Items***			***$ 378.00***	***$ 1,758.35***
19	N/A	N/A	N/A	**Total Budget - This Building**			**$ 4,158.00**	**$ 19,341.85**

STORAGE BUILDING

INSPECTION DATE: 5/15/03

Item#	Floor	Component	Condition	Notes	Life Exp. In Years	Est. Cost		Annual Maint Budget	Annual Cap Renew Budget
1	N/A	Roof	Fair	Tremco Insp. Rept. 7/15/03	4		$3,000		$ 825.00
2	N/A	Ext. Walls	Good	Tremco Insp. Rept 7/15/03, Caulk Windows in 2 yrs	10	$	-		$ -
3	N/A	Door, Sliding	Good	Double Wide Sliding, Wooden Doors (2-sets)	10	$	600.00	$ 200.00	$ 66.00
4	N/A	Door, Hinged	Good	Single 3/0 Door, Wooden	10	$	300.00	$ 200.00	$ 33.00
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19	N/A	N/A	N/A	**Sub-Totals**				**$ 400.00**	**$ 924.00**
20	N/A	N/A	N/A	***Misc. Costs base on 10% of Budgeted Items***				***$ 40.00***	***$ 92.40***
21	N/A	N/A	N/A	**Total Budget - This Building**				**$ 440.00**	**$ 1,016.40**

RECTORY, OFFICES

INSPECTION DATE: 5/15/03

Item#	Floor	Component	Condition	Notes	Life Exp. In Years	Est. Cost	Annual Maint Budget	Annual Cap Renew Budget
1	N/A	Roof	Excellent	Tremco Insp. Rept. 7/15/03	15	$ 42,000.00	$ 180.00	$ 3,080.00
2	N/A	Ext. Walls	Excellent	Tremco Insp. Rept 7/15/03, Caulk Windows in 2 yrs	2	$ 2,200.00		$ 1,210.00
3	1	ACCU#1	Good	Carrier: Installed 7/11/96	5	$ 1,800.00		$ 396.00
4	1	ACCU#2	Good	Carrier: Installed 7/11/96	5	$ 1,800.00		$ 396.00
5	1	ACCU#3	Good	Carrier: Installed 7/11/96	5	$ 1,800.00		$ 396.00
6	1	ACCU#4	Good	Carrier: Installed 7/11/96	5	$ 1,800.00		$ 396.00
7	1	ACCU#5	Good	Carrier: Installed 7/11/96	5	$ 1,800.00		$ 396.00
8	1	AHU#1	Good	Carrier: Installed 7/11/96	5	$ 1,400.00		$ 308.00
9	1	AHU#2	Good	Carrier: Installed 7/11/96	3	$ 1,400.00		$ 513.33
10	1	AHU#3	Good	Carrier: Installed 7/11/96	3	$ 1,400.00		$ 513.33
11	1	AHU#4	Good	Carrier: Installed 7/11/96	3	$ 1,400.00		$ 513.33
12	1	AHU#5	Good	Carrier: Installed 7/11/96	3	$ 1,400.00		$ 513.33
13	1	Vinyl Tile Flr	Excellent	Installed 6/15/02	10	$ 9,000.00		$ 990.00
14	1	Walls, Paint	Excellent	Painted 7/01/02	5	$ 7,000.00	$ 1,000.00	$ 1,540.00
15	1	Carpet	Excellent	Installed 6/15/02	8	$ 11,000.00	$ 500.00	$ 1,512.50
16	1	Light Fixt	Excellent	Installed 6/15/02	20	$ 5,000.00	$ 300.00	$ 275.00
17	1	Windows	Excellent	Installed 6/01/02	20	$ 8,000.00		$ 440.00
18	1	Fire Ext Sys	Excellent	Installed 5/01/02	30	$ 12,000.00	$ 1,800.00	$ 440.00
19	1	Fire Alarms	Excellent	Installed 5/01/02	30	$ 10,000.00	$ 500.00	$ 366.67
20	N/A	N/A	N/A	**Sub-Totals**			**$ 4,280.00**	**$ 14,195.50**
21	N/A	N/A	N/A	***Misc. Costs base on 10% of Budgeted Items***			***$ 428.00***	***$ 1,419.55***
22	N/A	N/A	N/A	**Total Budget - This Building**			**$ 4,708.00**	**$ 15,615.05**

CHURCH BUILDING

INSPECTION DATE: 5/15/03

Item#	Floor	Component	Condition	Notes	Life Exp. In Years	Est. Cost	Annual Maint Budget	Annual Cap Renew Budget
1	N/A	Roof	Excellent	Tremco Insp. Rept. 7/15/03	15	$ 52,000.00	$ 180.00	$ 3,813.33
2	N/A	Ext. Walls	Excellent	Tremco Insp. Rept 7/15/03, Caulk Windows in 2 yrs	2	$ 4,000.00		$ 2,200.00
3	1	ACCU#1	Excellent	Trane Installed 6/01/99	12	$ 3,400.00		$ 311.67
4	1	ACCU#2	Excellent	Trane Installed 6/01/99	12	$ 3,400.00		$ 311.67
5	1	ACCU#3	Excellent	Trane Installed 6/01/99	12	$ 3,400.00		$ 311.67
6	1	ACCU#4	Excellent	Trane Installed 6/01/99	12	$ 3,400.00		$ 311.67
7	1	ACCU#5	Excellent	Carrier Installed 6/01/99	11	$ 2,800.00		$ 280.00
8	1	AHU#1	Excellent	Trane Installed 6/01/99	10	$ 2,800.00		$ 308.00
9	1	AHU#2	Excellent	Trane Installed 6/01/99	10	$ 2,800.00		$ 308.00
10	1	AHU#3	Excellent	Trane Installed 6/01/99	10	$ 2,800.00		$ 308.00
11	1	AHU#4	Excellent	Trane Installed 6/01/99	10	$ 2,800.00		$ 308.00
12	1	AHU#5	Excellent	Carrier Installed 6/01/99	11	$ 2,800.00		$ 280.00
13	1	Marble Floor	Excellent	Installed 6/01/99	10	$ 38,000.00		$ 4,180.00
14	1	Beamed Ceiling	Excellent	Installed 6/01/99	20	$ 75,000.00		$ 4,125.00
15	1	Walls, Paint	Excellent	Painted 7/01/02	5	$ 19,000.00	$ 1,000.00	$ 4,180.00
16	1	Carpet	Excellent	Installed 6/01/99	8	$ 9,800.00	$ 500.00	$ 1,347.50
17	1	Light Fixt	Excellent	Installed 6/01/99	20	$ 7,000.00	$ 300.00	$ 385.00
18	1	Windows	Excellent	Installed 6/01/99	20	$ 25,000.00		$ 1,375.00
19	1	Fire Ext Sys	Excellent	Installed 6/01/99	30	$ 68,000.00	$ 1,800.00	$ 2,493.33
20	1	Fire Alarms	Excellent	Installed 6/01/99	30	$ 57,000.00	$ 500.00	$ 2,090.00
21	N/A	N/A	N/A	**Sub-Totals**			**$ 4,280.00**	**$ 29,227.83**
22	N/A	N/A	N/A	***Misc. Costs base on 10% of Budgeted Items***			***$ 428.00***	***$ 2,922.78***
23	N/A	N/A	N/A	**Total Budget - This Building**			**$ 4,708.00**	**$ 32,150.62**

BELL TOWER

INSPECTION DATE: 5/15/03

Item#	Floor	Component	Condition	Notes	Life Exp. In Years	Est. Cost	Annual Maint Budget	Annual Cap Renew Budget
1	N/A	Roof	Excellent	Tremco Insp. Rept. 7/15/03	15	$ 5,800.00	$ 180.00	$ 425.33
2	N/A	Ext. Walls	Excellent	Tremco Insp. Rept 7/15/03, Paint in 2 yrs	2	$ 2,100.00		$ 1,155.00
3	N/A	Carilon	Excellent		12	$ 22,000.00		$ 2,016.67
4	N/A	Door	Excellent		12	$ 500.00		$ 45.83
	N/A	N/A	N/A	**Sub-Totals**			**$ 180.00**	**$ 3,642.83**
	N/A	N/A	N/A	***Misc. Costs base on 10% of Budgeted Items***			***$ 18.00***	***$ 364.28***
	N/A	N/A	N/A	**Total Budget - This Building**			**$ 198.00**	**$ 4,007.12**

OGGERRO HALL, LIB., MUSIC ROOM

INSPECTION DATE: 5/15/03

Item#	Floor	Component	Condition	Notes	Life Exp. In Years	Est. Cost	Annual Maint Budget	Annual Cap Renew Budget
1	N/A	Roof	Good	Tremco Insp. Rept. 7/15/03	6	$ 34,000.00	$ 180.00	$ 6,233.33
2	N/A	Ext. Walls	Excellent	Tremco Insp. Rept 7/15/03, Paint in 2 yrs	2	$ 3,000.00		$ 1,650.00
3	1	ACCU#1	Poor	Carrier, 20 Ton Air Cooled Condensing Unit (Old)	2	$ 25,000.00		$ 13,750.00
4	1	ACCU#2	Good	Amana: Installed 6/15/96	3	$ 1,800.00		$ 660.00
5	1	AHU#1	Good	Carrier, Weathermaker	5	$ 4,200.00		$ 924.00
6	1	AHU#2	Good	Unknown brand: 6/15/96	5	$ 1,800.00		$ 396.00
7	1	Vinyl Tile Flr	Good	Installed 6/1596	10	$ 9,000.00		$ 990.00
8	1	Walls, Paint	Good	Painted 7/01/98	5	$ 7,500.00	$ 1,000.00	$ 1,650.00
9	1	Carpet	Good	Installed 6/15/98	8	$ 8,200.00	$ 500.00	$ 1,127.50
10	1	Light Fixt	Good	Installed 6/15/98	20	$ 5,000.00	$ 300.00	$ 275.00
11	1	Windows	Good	Installed 6/01/77	25	$ 16,000.00		$ 704.00
12	1	Fire Ext Sys	Excellent	Installed 5/0198	30	$ 42,000.00	$ 1,800.00	$ 1,540.00
13	1	Fire Alarms	Excellent	Installed 5/01/98	30	$ 38,000.00	$ 500.00	$ 1,393.33
14	N/A	N/A	N/A	**Sub-Totals**			**$ 4,280.00**	**$ 31,293.17**
15	N/A	N/A	N/A	***Misc. Costs base on 10% of Budgeted Items***			***$ 428.00***	***$ 3,129.32***
16	N/A	N/A	N/A	**Total Budget - This Building**			**$ 4,708.00**	**$ 34,422.48**

ST. THERESA CATHOLIC CHURCH

BUILDING CAPITAL RENEWAL BUDGET WITH ACCUMULATED TOTALS 25 YEARS

ALL BUILDINGS

Calendar Year	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Year By Year	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
Parish Activity Center	$ 27,440.78	$ 27,440.78	$ 25,461.00	$ 25,461.00	$ 25,461.00	$ 21,501.00	$ 21,501.00	$ 21,501.00	$ 19,301.00	$ 19,301.00
C.C.E. Building	$ 17,520.00	$ 17,520.00	$ 17,520.00	$ 17,520.00	$ 10,920.00	$ 9,600.00	$ 9,600.00	$ 9,600.00	$ 8,913.00	$ 8,913.00
Old Classroom Building	$ 26,268.09	$ 26,268.09	$ 11,960.00	$ 11,960.00	$ 11,960.00	$ 7,568.00	$ 7,568.00	$ 7,568.00	$ 7,444.00	$ 7,444.00
New Classroom Building	$ 16,389.45	$ 16,389.45	$ 13,914.00	$ 13,914.00	$ 13,914.00	$ 11,274.00	$ 11,274.00	$ 11,274.00	$ 10,174.00	$ 10,174.00
Community Center	$ 19,341.85	$ 13,341.85	$ 17,362.00	$ 17,362.00	$ 17,362.00	$ 15,217.00	$ 15,217.00	$ 15,217.00	$ 15,217.00	$ 15,217.00
Storage Building	$ 1,016.40	$ 1,016.40	$ 1,016.40	$ 1,016.40	$ 191.00	$ 191.00	$ 191.00	$ 191.00	$ 191.00	$ 191.00
Rectory, Offices	$ 15,615.05	$ 15,615.05	$ 14,405.00	$ 12,352.00	$ 12,352.00	$ 8,524.00	$ 8,524.00	$ 8,524.00	$ 7,011.00	$ 7,011.00
Church Building	$ 32,150.62	$ 32,150.62	$ 29,951.00	$ 29,951.00	$ 29,951.00	$ 25,771.00	$ 25,771.00	$ 25,771.00	$ 24,423.00	$ 24,423.00
Bell Tower	$ 4,007.12	$ 4,007.12	$ 2,852.00	$ 2,852.00	$ 2,852.00	$ 2,852.00	$ 2,852.00	$ 2,852.00	$ 2,852.00	$ 2,852.00
Oggero Hall, Library, Music Room	$ 34,422.48	$ 34,422.48	$ 19,022.00	$ 18,362.00	$ 18,362.00	$ 15,392.00	$ 9,159.00	$ 9,159.00	$ 8,032.00	$ 8,032.00
Annual Totals	**$ 194,171.84**	**$ 188,171.84**	**$ 153,463.40**	**$ 150,750.40**	**$ 143,325.00**	**$ 117,890.00**	**$ 111,657.00**	**$ 111,657.00**	**$ 103,558.00**	**$ 103,558.00**

Calendar Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Year By Year	**11**	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**
Parish Activity Center	$ 16,089.00	$ 16,089.00	$ 14,842.00	$ 14,842.00	$ 14,842.00	$ 11,542.00	$ 11,542.00	$ 11,542.00	$ 11,542.00	$ 11,542.00
C.C.E. Building	$ 5,833.00	$ 5,833.00	$ 5,099.00	$ 5,099.00	$ 5,099.00	$ 5,099.00	$ 5,099.00	$ 5,099.00	$ 5,099.00	$ 5,099.00
Old Classroom Building	$ 6,366.00	$ 6,366.00	$ 6,366.00	$ 6,366.00	$ 6,366.00	$ 6,366.00	$ 6,366.00	$ 6,366.00	$ 6,366.00	$ 6,366.00
New Classroom Building	$ 8,722.00	$ 8,722.00	$ 7,668.00	$ 7,668.00	$ 7,668.00	$ 6,238.00	$ 6,238.00	$ 6,238.00	$ 6,238.00	$ 6,238.00
Community Center	$ 12,181.00	$ 12,181.00	$ 10,421.00	$ 10,421.00	$ 10,421.00	$ 6,608.00	$ 6,608.00	$ 6,608.00	$ 6,608.00	$ 6,608.00
Storage Building	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Rectory, Offices	$ 6,021.00	$ 6,021.00	$ 6,021.00	$ 6,021.00	$ 6,021.00	$ 6,021.00	$ 6,021.00	$ 6,021.00	$ 6,021.00	$ 6,021.00
Church Building	$ 19,011.00	$ 18,731.00	$ 16,238.00	$ 16,238.00	$ 16,238.00	$ 12,424.00	$ 12,424.00	$ 12,424.00	$ 12,424.00	$ 12,424.00
Bell Tower	$ 2,852.00	$ 2,852.00	$ 790.00	$ 790.00	$ 790.00	$ -	$ -	$ -	$ -	$ -
Oggero Hall, Library, Music Room	$ 7,042.00	$ 7,042.00	$ 7,042.00	$ 7,042.00	$ 7,042.00	$ 7,042.00	$ 7,042.00	$ 7,042.00	$ 7,042.00	$ 7,042.00
Annual Totals	**$ 84,117.00**	**$ 83,837.00**	**$ 74,487.00**	**$ 74,487.00**	**$ 74,487.00**	**$ 61,340.00**	**$ 61,340.00**	**$ 61,340.00**	**$ 61,340.00**	**$ 61,340.00**

Calendar Year	2024	2025	2026	2027	2028
Year By Year	**21**	**22**	**23**	**24**	**25**
Parish Activity Center	$ 6,895.00	$ 6,895.00	$ 6,895.00	$ 6,895.00	$ 6,895.00
C.C.E. Building	$ 4,192.00	$ 4,192.00	$ 4,192.00	$ 4,192.00	$ 4,192.00
Old Classroom Building	$ 6,366.00	$ 6,366.00	$ 6,366.00	$ 6,366.00	$ 6,366.00
New Classroom Building	$ 3,983.00	$ 3,983.00	$ 3,983.00	$ 3,983.00	$ 3,983.00
Community Center	$ 4,435.00	$ 4,435.00	$ 4,435.00	$ 4,435.00	$ 4,435.00
Storage Building	$ -	$ -	$ -	$ -	$ -
Rectory, Offices	$ 5,306.00	$ 5,306.00	$ 5,306.00	$ 5,306.00	$ 5,306.00
Church Building	$ 6,539.00	$ 6,539.00	$ 6,539.00	$ 6,539.00	$ 6,539.00
Bell Tower	$ -	$ -	$ -	$ -	$ -
Oggero Hall, Library, Music Room	$ 6,767.00	$ 6,767.00	$ 6,767.00	$ 6,767.00	$ 6,767.00
Annual Totals	**$ 44,483.00**	**$ 44,483.00**	**$ 44,483.00**	**$ 44,483.00**	**$ 44,483.00**

"They purchased timber and dressed stone for the repair of the temple of the Lord and met all the other expenses of restoring the temple."

2 Kings 12:12

FORMS

See attached sheets for systems service and equipment information. In addition, there are forms for inspection sheets as well as a form to use for systems, sub-systems and frequency of inspection.

- **Frequency of Inspection Chart**
- **Air Conditioning and Heating Task Sheet**
- **Inspection Checklist**

FREQUENCY OF INSPECTIONS AND SERVICES FOR SYSTEMS AND SUB-SYSTEMS

DESCRIPTION	INSPECTION SCHEDULE	
ROOF SYSTEM		
SURFACE	2XPA	
DRAINS	2XPA	
SCUPPERS	2XPA	
ROOF COMPOSITION	2XPA	
ACCESS	2XPA	
PENETRATIONS	2XPA	
REPAIR PATCHES	2XPA	
EDGING	2XPA	
DOWNSPOUTS	2XPA	
TERMINAL DRAINS	2XPA	
HVAC		
CONDENSING UNITS	2XPA	
AIR HANDLERS/FURNACES	2XPA	
REFRIGERANT PIPING	ANNUAL	
CHILLERS	DAILY	OTHER-QUARTERLY
PUMPS	DAILY	OTHER-QUARTERLY
WATER TOWERS	DAILY	OTHER-QUARTERLY
REFRIGERATED WALK-IN COOLERS AND/OR FREEZERS	2XPA	
ICE MACHINES	2XPA	
AIR CURTAINS	2XPA	
VENTILATION	2XPA	
KITCHEN GREASE VAPOR EXHAUST SYSTEMS	2XPA	CLEAN AS REQUIRED
BATHROOM AND MISC. EXHAUST SYSTEMS	2XPA	
INDOOR AIR QUALITY TESTING AND/OR MONITORING	N/A	AS NEEDED
PLUMBING		
BOILERS	4XPA	ANNUAL STATE INSP
WATER HEATERS	2XPA	DRAIN QUARTERLY
GAS LINES (INTEGRITY AND PRESSURE)	ANNUAL	
DRAINS	ANNUAL	PLUS VISUAL
PUMPS	2XPA	PLUS VISUAL
TOILETS, URINALS AND SINKS	ANNUAL	PLUS VISUAL
FONTS AND FONT HEATERS	2XPA	PLUS VISUAL
PRESSURE TESTING	N/A	AS REQUIRED
ELECTRICAL		
MAIN SERVICE (SERVICE HEAD)	ANNUAL	
ELECTRICAL LINES	ANNUAL	
LIGHTING	ANNUAL	
SWITCHES, OUTLETS AND BREAKERS	ANNUAL	
LIGHTNING AND GROUNDING PROTECTION	ANNUAL	
FAULT AND SURGE PROTECTION	ANNUAL	
TESTING	ANNUAL	
LOAD CALCULATIONS (WHERE NECESSARY)	N/A	AS NEEDED/REQUIRED
THERMOGRAPHS (WHERE NECESSARY)	N/A	AS NEEDED/REQUIRED
BUILDING EXTERIOR		
FOUNDATION	ANNUAL	AS NEEDED
WALLS	ANNUAL	
WINDOWS (GLASS INTEGRITY AND SEALS)	ANNUAL	
WALKWAYS AND COVERS	ANNUAL	
LIGHTING	ANNUAL	
TRIM	ANNUAL	
DOORS	ANNUAL	
PAINTING AND COATINGS	ANNUAL	
SEALS AND CAULKING	ANNUAL	
PARKING	ANNUAL	

DESCRIPTION	INSPECTION SCHEDULE	
BUILDING INTERIOR		
BUILDING ENVELOPE	ANNUAL	AS NEEDED
CEILINGS (ACOUSTICAL TILE, OTHER)	ANNUAL	AS NEEDED
WALLS	ANNUAL	AS NEEDED
FLOORS (CARPET, TILE, CLEANING, REPAIRS)	ANNUAL	AS NEEDED
WOODWORK AND TRIM	ANNUAL	AS NEEDED
GLASS	ANNUAL	AS NEEDED
DOORS	ANNUAL	AS NEEDED
FIXTURES	ANNUAL	AS NEEDED
LIGHTING	ANNUAL	AS NEEDED
PAINTINGS AND COATINGS	ANNUAL	AS NEEDED
SEALS AND CAULKING	ANNUAL	AS NEEDED
INSULATION (WALL AND CEILING)	ANNUAL	AS NEEDED
FIRE SUPPRESSION SYSTEMS		
FIRE EXTINGUISHERS	ANNUAL	
FIRE PUMPS	ANNUAL	
FIRE HOSE	ANNUAL	
FIRE HOSE CABINETS	ANNUAL	
SPRINKLERS	ANNUAL	
FIRE/SMOKE ALARMS		
FIRE ALARM PANELS	ANNUAL	
FIRE ALARM CONTROLS	ANNUAL	
SMOKE DETECTION SYSTEMS	ANNUAL	
ENUNCIATORS	ANNUAL	
GROUNDS		
LANDSCAPING	WEEKLY	
LAWNS	WEEKLY	
IRRIGATION SYSTEMS (WHERE APPLICABLE)	ANNUAL	
LAWN AND LANDSCAPE EQUIPMENT (WHERE APPLICABLE)	ANNUAL	
CLEAN UP	ON-GOING	
MAINTENANCE AND PRUNING	ON-GOING	
SITE DRAINAGE	ANNUAL	AS NEEDED
CONTROLS AND MISCELLANEOUS		
BUILDING AUTOMATION SYSTEMS	ANNUAL	
HVAC CONTROLS (LOCAL AND/OR REMOTE)	2XPA	
LIGHTING CONTROLS	ANNUAL	
SOUND SYSTEMS	ANNUAL	
CARILLON	ANNUAL	
ORGAN	ANNUAL	
PEST CONTROL/MANAGEMENT		
WOOD DESTROYING INSECTS	QUARTERLY	
SWARMING INSECTS	QUARTERLY	
TREATMENT PLANS	QUARTERLY	
OTHER		
ASBESTOS (TESTING, ABATEMENT, ENCAPSULATION AND MONITORING)	N/A	AS NEEDED
MOLD (TESTING AND REMEDIATION)	N/A	AS NEEDED
OTHER ISSUES RELATING TO MAINTENANCE AND REPAIRS	N/A	AS NEEDED
SIGNS		
INTERIOR AND EXTERIOR SIGNS INCLUDING MAIN MARQUEE SIGN	ANNUAL	

Job Ticket No.

AIR CONDITIONING & HEATING TASK SHEET

Parish _____

Address: _____

City, St, Zip

Phone:

Reason for action:

Work Completed

Materials

Quantity	Description	Part No./Cost
		$0.00
		$0.00
		$ -
		$ -

Tech	Date	Start	Finish	HrsST	HrsOT
Parts & Labor					$ -
Applicable Tax					$ -
Invoice Amount					$ -

BUILDING:

ACTION DATE: _____

Maintenance Contract (Y/N)

Prev Maint_____	Start Up _____		
Repair	Warranty _____		
Install	Other		
Equipment Data			
Unit Tag No.			
Manufacturer			
Model Number			
Serial Number			
Head Pressure			
Suction Pressure			
Volts/Ph/Cyc	/	/	/
Entering Air/Water	/	/	/
Leaving Air/Water	/	/	/
Amps Actual			
Refrig Type/Lbs	/	/	/
Refrig Recovered	Lbs	Lbs	Lbs
Refrig Recycled	Lbs	Lbs	Lbs
Refrig Added	Lbs	Lbs	Lbs
Tools/Equipment Required			
Air Flow Hood			
Anemometer or Tach			
Flu Gas Analyzer			
High Pressure Sprayer			
HP Ref Recov Unit			
Leak Detector			
CO Meter / Sys Read			
Thermister/RH Meter			
Torch Set,Oxy/Acetyl			
Vacuum Pump			

Technician's Signature;_____

Date:_____

Acceptance:

This work has been completed and is documented

Signature:_____

Date:_____

Houston North

BILLING DATE _____

WORK ORDER No. _____

P.O. BOX 16008 • HOUSTON, TEXAS 77222-6008
(713) 692-7702 • FAX (713) 692-1311 • TACLA 000524C

EQUIPMENT INFORMATION

MODEL NO. _____

S/N NO. _____

SYSTEM NO. _____

WORK LOCATION _____

CUSTOMER _____

WARRANTY ☐ _____

F.M. ☐ _____

CHARGE ☐ _____

COMPLETE ☐ _____

INCOMPLETE ☐ _____

CUSTOMER P.O.

QTY.	PART NO.	DESCRIPTION OF MATERIAL USED	P.O./S.S.	UNIT	PRICE	SOURCE T	SOURCE W	SOURCE S	UNIT	AMOUNT
	MISCELLANEOUS MATERIAL									
									TOTAL MATERIAL	

DATE	MECHANIC	DESCRIPTION OF WORK DONE	RT HRS.	OT HRS.	AMOUNT
		SERVICE CHARGE			
				TOTAL LABOR	
				TAX	
				TOTAL	

Customer agrees to and acknowledges the following interest will be charged on past due accounts at the rate of 1½% per month or the highest legal rate, whichever is less if necessary for Houston North to retain an attorney for collection. Customer agrees to pay all costs of collection including court costs and reasonable attorney's fees. Questions regarding this invoice shall be called to Houston North's attention by the customer within ten days after receipt, otherwise billing will be assumed correct. This or any other invoice pertaining to the work involved, whether or not signed by customer, shall constitute and be an integral part of the agreement until final payment is made and to secure such payment. Houston North will retain title to any parts, material and equipment furnished. Regulated by The Texas Department of Licensing Regulations, P.O. Box 12157, Austin, TX 78711, 1-800-803-9202.

Authorized By _____

ALL BILLS DUE UPON RECEIPT OF INVOICE

HOUSTON NORTH AC & REFRIGERATION

Job #

Model	Serial	Store No.	Outdoor Temp.	Date / /
Address		City	Serviceman	

COMPRESSORS

	#1	#2	#3	#4
Head Pressure				
Suction Pressure				
Oil Pressure				
Oil Level	○	○	○	○
Drive				
HP. Cutout LP. Cutout				
Comp. Amps & Volts				
Name Plate Amps & Volts				
Freon & Oil Leaks				
Superheat				
Dry Eye Indicates				
Crankcase Heaters				
Oil Failure Time				

PUMPS

Pump Seals, Bearings				
Pump Amps & Volts				
Name Plate Amps & Volts				

AIR HANDLING UNITS

	#1	#2	#3	#4	#5	#6	#7
Temp. In Temp. Out							
Drains							
Coils							
Fan Belts							
Lubricated							
Filters							
Fan Amps							
Name Plate Amps & Volts							

AIR COOLED CONDENSER

	#1	#2
Coil		
Fan Belts		
Condition		
Fan [illegible] Volts		
Name Plate Amps & Volts		
Dampers & Operators		
Lubricated		

TOWER

Basin Clean	
Gear Box	
Drive	
Appearance & Sound	
Fan Amps & Volts	
Name Plate Amps & Volts	
Bleed Off	
Water Treatment	

CONTROLS

Thermostat Setting	Return PSI	Supply PSI	Ch. Wtr. Temp. In / Condenser Water (or Air) Temp. In
Control Air	Condition of Starters		
Automatic Valves/Operations	Starter Contacts		Ch. Wtr. Temp. Out / Condenser Water (or Air) Temp. Out
	Disconnect Switches	Fuse Clips	

HEATING BOILER

Water Temp. In & Out		High Limit Setting	
Circulator		Ignition and Pilot-Stat or Safety	
Safety Valve		Pressure	
Vent		Expansion Tank Air Cushion	
Blow Down		Low Water Cutoff	
Flue Gas Eff. Test		Boiler Water Level	

FURNACE

Ignition and Pilot-Stat or Safety		Condition of Burner/Flame	
High Limit		Fan/Drive/Belts	
Fan Opr. Switch Relay		Filters	
Heat Exchanger Clean		Elec. Htr. Coils	
Entering Air Temp.		Limit Switches	
Leaving Air Temp.		Fan Interlock	

Remarks/Recommendations

Customer's Signature

WHITE-OFFICE CANARY-CUSTOMER

PEAK
ROOFING, INC.
Craftsmanship at the Highest Level.

Roof Care and Maintenance

Sooner or later every roof needs to be replaced. If it is old and worn, limited repairs won't help. A roof tends to wear uniformly, and even the best roofing materials will eventually succumb to weathering. The biggest enemies of roofing are the sun, wind, rain, hail (freeze/thaw cycles) and seasonal temperature changes.

Properly installed roofing products will provide years of protection. Even so, there are certain aspects of roof care that the owner should be made aware of to ensure maximum roof performance.

Shingle Roof

Are gutters and roof surfaces clear of fallen leaves, pine needles, twigs and other debris?
Are downspouts from an upper story dropping onto a lower roof?
Are tree limbs scuffing the roof surface?
Are climbing roses, vines and ivy trimmed back from the roof?

Signs of a weathered roof are excessive loss of protective mineral granules and cracked, curled or missing shingles. Inspect the attic with a flashlight for signs of leaks. Check downspouts for signs of excessive granule loss. If a asphalt shingle roof is more than 20 years old it is a prime candidate for reroofing.

Use binoculars to inspect the shingle roof from the ground. Walking on a sloped roof is not only dangerous, it may also damage the shingles.

Flat Roof

Condition of Roof Membrane

Any blisters, splits, buckles or punctures?
Any bare spots, displaced gravel, thin coating or severe granule loss?
Reflective coating in good condition?
Any evidence of ponding water?
Any evidence of residue deposits or foreign contamination?
Are A/C condensation lines extending into drains?
Any evidence of traffic or physical damage?
Any evidence of wet insulation?

P.O. Box 70768 • Houston, TX. 77270-0768
Phone: 713 864-7325 • Fax: 713 864-7608

PEAK
ROOFING, INC.
Craftsmanship at the Highest Level.

General Conditions

Any building or structural movement?
Any deflection or sagging deck?
Any alterations, additions or new penetrations?
Any change in building use?

Maintenance Requirements

	No problems	Maintenance Required	Not Applicable
Edge metal	____	____	____
Counter flashings	____	____	____
Expansion joints	____	____	____
Pitch pans	____	____	____
Drains	____	____	____
Scuppers	____	____	____
Skylights	____	____	____
Coping Covers	____	____	____
Vents	____	____	____
Flues	____	____	____
Antennae	____	____	____
HVAC Equipment	____	____	____
Sign Supports	____	____	____
Coatings/Toppings	____	____	____
Debris	____	____	____
Other	____	____	____

Roof inspections should be performed semi-annually. If you do not have someone on your staff that feels comfortable or is qualified to perform this service please feel free to call Peak Roofing, Inc.

P.O. Box 70768 • Houston, TX. 77270-0768
Phone: 713 864-7325 • Fax: 713 864-7608

Inspection Checklist

Date	By	Date	By	Date	By	Date	By

BUILDING	SAT	UNSAT
SITE AND GROUNDS		
Are there ramps and provisions for the physically handicapped?	Y	N
Are there designated parking spaces for the physically handicapped?	Y	N
Has soil dropped or heaved?	N	Y
Is there standing water near or against the building in any season?	N	Y
Are retaining walls leaning or in need of repair?	N	Y
Have fences deteriorated?	N	Y
Do fence gates operate properly?	Y	N
Do trees and shrubs need care?	N	Y
BUILDING EXTERIOR – FOUNDATION		
Do foundation walls show the following signs of decay or settlement:		
Large cracks?	N	Y
Visible separation between top of foundation wall and building frame?	N	Y

Date	By	Date	By

COMMENTS

Inspection Checklist

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BUILDING:

SAT	UNSAT

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COMMENTS

BUILDING EXTERIOR – FOUNDATION

	SAT	UNSAT
Loose, cracked, or broken blocks, bricks, or stones?	N	Y
Soft or flaking mortar or concrete?	N	Y
Foundation movement?	N	Y
Water leaks?	N	Y
Stains or discoloration?	N	Y
Bulging or bowing?	N	Y
Are interior basement or crawl space foundation walls damp?	N	Y
Are there mushroom growths, mold stains, or mildew odors in basement or crawl space?	N	Y
Are there insect tubes visible along the foundation walls?	N	Y

BUILDING EXTERIOR – MASONRY WALLS

Does exterior masonry show the following signs of deterioration:

	SAT	UNSAT
Cracks in walls?	N	Y
Cracks over doors or windows?	N	Y

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BUILDING	SAT	UNSAT
BUILDING EXTERIOR – MASONRY WALLS		
Loose bricks?	N	Y
Cracked bricks?	N	Y
Missing bricks?	N	Y
Cracked, chipped, missing mortar?	N	Y
Soft or flaking mortar?	N	Y
White or gray stains:	N	Y
Water penetration?	N	Y
Moss or algae growth?	N	Y
Split, brittle, or missing caulking?	N	Y
Are weep holes in retaining walls, under window sills, and other wall construction free of obstruction?	Y	N
Is wood molding and trim cracked, warped, or rotted?	N	Y
BUILDING EXTERIOR – FRAME WALLS		
Is there evidence of rot or deterioration of wood sills, walls, or siding?	N	Y
Is there evidence of water stains or water penetration into the wood?	N	Y

(continued next page)

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COMMENTS

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COMMENTS

BUILDING EXTERIOR – FRAME WALLS

Are siding boards cracked or split?	N	Y
Are siding boards buckled?	N	Y
Are nails rusting excessively?	N	Y
Can a knife blade or a key be easily pushed into wood siding or structural wood member?	N	Y
Are exterior wood moldings cracked, missing, broken, or separated from the building?	N	Y
Is wood badly stained?	N	Y
Is there evidence of the following on visible structural wood members:		
Severe staining or discoloration?	N	Y
Split or cracked wood?	N	Y
Crumbled or crushed wood?	N	Y
Piles of sawdust?	N	Y
Rot and deterioration?	N	Y
Bee hives?	N	Y
Bird nests?	N	Y
Rodents?	N	Y
Bats?	N	Y

(continued next page)

Inspection Checklist

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BUILDING

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COMMENTS

BUILDING EXTERIOR – FRAME WALLS

Are wall cavities insulated?	Y	N
Is paint blistered or peeling?	N	Y
Has building been painted in the last seven years?	Y	N

BUILDING EXTERIOR – ROOF, ALL TYPES

Inspect all roofs for evidence of deterioration, weather damage, and water penetration. If roof is not accessible, use binoculars. Check interior of building for evidence of water damage.

Are there gaps or holes around any roof penetrations, chimneys, or vents?	N	Y
Are there signs of movement in roofing material or flashing?	N	Y
Are flashings rusted or pitted?	N	Y
Are flashings separated, loose, or missing?	N	Y
Are there dissimilar metals in contact?	N	Y
Do metal components need painting?	N	Y

(continued next page)

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BUILDING

SAT	UNSAT

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COMMENTS

BUILDING EXTERIOR – ROOF, ALL TYPES

	SAT	UNSAT
Is caulking missing, split, or deteriorated at the following:		
Parapets?	N	Y
Copings?	N	Y
Flashings:	N	Y
Soffits:	N	Y
Vents or chimneys?	N	Y
Skylights?	N	Y
Other roof penetrations?	N	Y
Are there any loose or broken glass panes in skylights	N	Y
Is there evidence of water seepage through soffits?	N	Y
Does roof/attic have proper ventilation?	Y	N
Does the roof hatch work?	Y	N
Is anchorage for TV antenna secure?	Y	N
Is antenna adequately grounded?	Y	N
Is there lightning protection?	Y	N

(continued next page)

Inspection Checklist

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BUILDING

SAT	UNSAT

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COMMENTS

BUILDING EXTERIOR – BUILT-UP ROOF

Are there blisters, bubbles, cracks, splits, or open seams in roofing membrane?	N	Y
Is roof pitted or worn?	N	Y
Is there evidence of standing water or puddles?	N	Y
Are roof drains clear and operating properly?	Y	N
Does roof feel "squishy" under foot?	N	Y
Can roofing felt material be seen?	N	Y
Are gravel stops secure?	Y	N
Are gravel stops rusted or pitted?	N	Y
Do expansion joints show evidence of separation or water penetration?	N	Y

BUILDING EXTERIOR – BUILT-UP ROOF

Is any vegetation growing through roofing?	N	Y
Is roof over 15 years old?	N	Y

BUILDING EXTERIOR – SHINGLE ROOF

Are shingles loose, split, missing, or broken?	N	Y
Are mineral granules thinned out?	N	Y
Are shingle edges curling or worn?	N	Y

(continued next page)

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BUILDING

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COMMENTS

BUILDING EXTERIOR – SHINGLE ROOF (continued)

	SAT	UNSAT
Is there moss growth?	N	Y
Is roof over 20 years old?	N	Y

BUILDING EXTERIOR – SLATE ROOF

	SAT	UNSAT
Are there broken, missing, or loose slates?	N	Y
Are slates worn?	N	Y
Do slate fasteners appear broken or rusty?	N	Y
Are ridge rolls loose, deteriorated, or rusted?	N	Y
Are there sections patched with asphalt?	N	Y

BUILDING EXTERIOR – METAL ROOF

	SAT	UNSAT
Are metal roof sheets rusted?	N	Y
Are there signs of holes, pitting, or cracking?	N	Y
Are there any open joints?	N	Y
Are there any defective fasteners?	N	Y

Inspection Checklist

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BUILDING

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COMMENTS

BUILDING EXTERIOR – DOORS AND WINDOWS

Are flashings over doors and windows cracked, missing, or rusted?	N	Y
Is trim around doors and windows split, loose, or deteriorated?	N	Y
Is caulking around door and window frames and trim cracked or missing?	N	Y
Are sills loose or deteriorated?	N	Y
Is window putty missing or cracked?	N	Y
Is there broken or cracked glass?	N	Y
Are stained glass windows bowed/warped?	N	Y
Do doors and windows lock properly?	Y	N
Is hardware defective?	N	Y
Are doors and windows weather-stripped?	Y	N
Do doors and windows operate and seal properly?	Y	N
Is building equipped with storm doors and storm windows?	Y	N
Do storm doors and windows operate properly?	Y	N
Do storm windows show condensation?	N	Y
Are there holes or tears in screens?	N	Y
Are screens, shutters, and other exterior window attachments secure?	Y	N
Has finish paint or varnish deteriorated?	N	Y

Inspection Checklist

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BUILDING

SAT	UNSAT

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COMMENTS

BUILDING EXTERIOR – PARAPET WALLS, COPINGS AND CHIMNEYS

Are walls cracked?	N	Y
Are bricks loose or spalling?	N	Y
Do mortar joints require pointing?	N	Y
Is mortar joint under coping cracked or loose?	N	Y
Are coping stones or metal copings loose, broken, or shifted?	N	Y
Is coping joint open, permitting water to enter?	N	Y
Is flashing missing, loose, or damaged?	N	Y
Is there evidence of moisture penetration?	N	Y
Do chimneys lean?	N	Y

BUILDING EXTERIOR – PORCHES, STAIRS AND BALCONIES

Do porches, stairs, or balconies require painting?	N	Y
Is porch floor structure decayed, weak, or cracked?	N	Y
Are stair treads loose or broken?	N	Y
Are column bases rotted or in need of repair?	N	Y
Are railings broken or weak?	N	Y
Are balusters broken, loose, or missing?	N	Y

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BUILDING

SAT	UNSAT

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COMMENTS

BUILDING EXTERIOR – GUTTERS & DOWNSPOUTS

Are there loose, rotted, or missing gutters or downspouts?	N	Y
Are there holes in gutters or downspouts?	N	Y
Do gutter or downspout joints leak?	N	Y
Are gutters or downspouts pitted or rusted?	N	Y
Do gutters or downspouts require painting?	N	Y
Do gutters sag or lack pitch to downspouts?	N	Y
Is water running down face of building?	N	Y
Do splash blocks or drains under downspouts divert water away from building?	Y	N

BUILDING EXTERIOR – ATTACHMENTS

Are the following items in good condition and well secured to building:

Lattices?	Y	N
Columns?	Y	N
Flagpoles?	Y	N
Cables, wires?	Y	N

(continued next page)

Date	By	Date	By	Date	By	Date	By	SAT	UNSAT	Date	By	Date	By

BUILDING	SAT	UNSAT	COMMENTS
Weathervanes?	Y	N	
Towers?	Y	N	
Gargoyles, sculptures?	Y	N	
Canopies?	Y	N	
Balconies?	Y	N	
Signs, alarms, lights?	Y	N	
Ledges, projections?	Y	N	
Decorations, ornaments?	Y	N	
Meters?	Y	N	
Other?	Y	N	
BUILDING INTERIOR – FLOORS			
Are floor joists warped, cracked, or sagging?	N	Y	
Is floor joist blocking and bridging secure?	Y	N	
Is there visible separation between floors and walls at base trim?	N	Y	
Do floors squeak or creak?	N	Y	
Are floors "bouncy"?	N	Y	
Are floors at entrances slip-resistant?	Y	N	
Are masonry and tile floors cracked, broken, or worn?	N	Y	
Is wood flooring warped, separated, or badly worn?	N	Y	
Is carpeting loose, torn, or badly worn?	N	Y	

Inspection Checklist

Date	By	Date	By	Date	By	Date	By

BUILDING

SAT	UNSAT

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COMMENTS

BUILDING INTERIOR – WALLS

Is there evidence of water staining?	N	Y
Are there cracks?	N	Y
Are surfaces peeling or dirty?	N	Y
Is wall finish buckled or loose?	N	Y

BUILDING INTERIOR – CEILINGS

Is there evidence of water staining?	N	Y
Are there cracks?	N	Y
Are surfaces peeling or dirty?	N	Y
Is ceiling structure sagging or separating?	N	Y
Is ceiling tile grid secure?	Y	N
Are there damaged ceiling tiles?	N	Y
Are light fixtures secure?	Y	N

Date	By	Date	By	Date	By	Date	By

BUILDING

SAT	UNSAT

Date	By	Date	By

COMMENTS

BUILDING INTERIOR – DOORS AND WINDOWS

Are doorjambs plumb?	Y	N
Do doors bind?	N	Y
Do doors have loose or missing hinges, knobs, or locks?	N	Y
Is there evidence of condensation on or around windows?	N	Y
Is there evidence of mold, discoloration, or deterioration around windows and doors?	N	Y

BUILDING INTERIOR - ATTICS

Do rafters, floor joists, and sheathing show signs of:

Water stains or deterioration?	N	Y
Warping?	N	Y
Cracking?	N	Y
Sagging?	N	Y

Is there evidence of water leaking into attic around any of the following roof penetrations:

Vents?	N	Y
Ducts:	N	Y
Chimneys?	N	Y
Other?	N	Y

(continued next page)

Date	By	Date	By	Date	By	Date	By

BUILDING

SAT	UNSAT

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COMMENTS

BUILDING INTERIOR – ATTICS

Is attic floor insulated?	Y	N
Is there at least one square foot of vent area for every 500 square feet of attic area?	Y	N
Are attic fans or vents operating?	Y	N
Are roof rafters excessively dry? (This condition can result from overheating in summer months.)	N	Y
Is attic free of debris and unused combustible items?	Y	N
Are off-season and other materials stored neatly and away from heat sources?	Y	N

BUILDING INTERIOR – CRAWL SPACE AND BASEMENT

Is crawl space or basement damp, wet, or water stained?	N	Y
Does water infiltrate through crawl space or basement walls or floor?	N	Y
Does water drain into basement from window wells?	N	Y
Is crawl space or basement floor cracked or disintegrated?	N	Y
Are crawl space or basement walls insulated?	Y	N
Does crawl space have wall vents?	Y	N
Does dirt floor of crawl space have a vapor barrier?	Y	N

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BUILDING

SAT	UNSAT

Date	By	Date	By

COMMENTS

MECHANICAL EQUIPMENT

	SAT	UNSAT
Are there water leaks at any of the following locations:		
Pipes?	N	Y
Radiators?	N	Y
Boiler?	N	Y
Hot water heater?	N	Y
Pumps?	N	Y

MECHANICAL EQUIPMENT

Has the boiler or furnace been cleaned and serviced in the past 12 months?	Y	N
Is the boiler insulation cracked or missing?	N	Y
Is the boiler more than 35 years old?	N	Y
Is there excessive steam or air loss at radiators?	N	Y
Are exposed pipes adequately insulated?	Y	N
Do hot air supply or return registers adjust airflow properly?	Y	N
Do thermostats work properly?	Y	N
Is the domestic hot water heater insulated?	Y	N
Do kitchens and bathrooms have adequate ventilation?	Y	N
Do large assembly areas have adequate ventilation?	Y	N

Inspection Checklist

Date	By	Date	By	Date	By	Date	By

BUILDING

PLUMBING

	SAT	UNSAT
Are there water leaks at any of the following locations:		
Bathroom fixtures?	N	Y
Faucets?	N	Y
Piping?	N	Y
Do flush valves, faucets work properly?	Y	N
Are any drains or traps clogged?	N	Y

Date	By	Date	By

COMMENTS

JNA ARCHITECTS

NAME OF BUILDING _____

ADDRESS _____

DATE OF ORIGINAL CONSTRUCTION:
ORIGINAL CONSTR. DOCS. AVAILABLE/REVIEWED _____
TYPE OF MASONRY CONSTRUCTION:
LOAD BEARING _____ **APPROX. THICKNESS** _____
VENEER SYSTEM _____
STRUCTURAL SYSTEM BACK-UP _____

INSPECTION COMPLETED BY _____ **DATE** _____

VISUAL INSPECTION CHECKLIST FOR MASONRY BUILDINGS

ROOF / PARAPET CONDITION

DESCRIBE THE EXISTING ROOF CONDITION:

IS THERE A MASONRY PARAPET:

CONDITION OF THE MASONRY AND MORTAR:

CONDITION OF ROOF TERMINATION AND FLASHING:

EVIDENCE OF DETERIORATION:

EVIDENCE OF POOR WATER DRAINAGE:

CONDITION OF DRAINS, SCUPPERS, AND GUTTERS:

WALL CONDITION

CONDITION OF DOWN SPOUTS, ROOF OVERHANGES:

EVIDENCE OF DRAINAGE WATER ON MASONRY:

CONDITION OF INDIVIDUAL MASONRY UNITS:

INDIVIDUAL BRICK UNITS/LOCATION:

INDIVIDUAL STONE UNITS/LOCATION:

MORTAR:

EVIDENCE OF PREVIOUS TUCKPOINTING/THOROUGHNESS/CONDITION:

CONDITION AT OPENINGS:

DOOR OPENINGS:

WINDOW OPENINGS:

MECHANICAL OPENINGS:

EVIDENCE OF MOVEMENT AT OPENINGS:

VERTICAL OR DIAGONAL CRACKING OF MORTAR:

EVIDENCE OF MOVEMENT IN WALL:

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ARCHITECTS
(847) 692-6166
FAX (847) 692-2002

WALL CONDITION-(continued)

OPENING OF MORTAR JOINTS:

OPENING (CRACKING) OF UNIT MASONRY:

EVIDENCE OF ACID/POLLUTION ON MASONRY:

EFFLORESCENCE:

MASONRY FACE DETERIORATION:

EVIDENCE OF WATER WITHIN WALL:

DETERIORATION OF UNIT FACING (SPALLING / CRACKING / POPING OUT):

EVIDENCE OF STUCTURAL MOVEMENT:

BOWING OF THE SURFACE:

PULLING AWAY OF VENEER:

RUST APPEARING ON MASONRY/MORTAR SURFACES:

MASONRY BASE CONDITION:

MASONRY UNIT USED:

MASONRY CONDITION:

EVIDENCE OF WEEPS IN VENEER BLDGS:

TERMINATION OF DOWNSPOUTS:

ROOF DRAINAGE AWAY FORM BLDG:

GROUND PITCHED TO CARRY GROUND WATER AWAY:

EVIDENCE OF WATER AT/INTO BASE:

CONCLUSIONS:

GENERAL CONDITION OF BUILDING MASONRY:

MASONRY CONCERNS IDENTIFIED DURING THIS SURVEY:

IMMEDIATE FOLLOW-UP RECOMMENDATIONS PER THIS SURVEY:

NOTIFICATION OF THIS SURVEY/RECOMMENDATIONS TO OWNER REPRESENTATIVE:

DATE: