Unitarian Property
Burlington, VT

Capital Needs Assessment
June 2, 2016

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Executive Summary

This four building complex in downtown Burlington is anchored by the historic landmark Unitarian Meetinghouse. The other buildings are older residential structures that have been converted to office rentals. The site includes parking, lawns and landscaping.

The condition of the buildings varies but all are older and all will require constant attention to projects throughout the report period to maintain them. The smaller buildings will need attention to roofs, some windows, porches, exterior painting, heating and hot water systems and electrical upgrades. These are typical expenses for 100+ year old buildings.

The Meetinghouse has been 23 years since the 1994 expansion and renovation. It has exceptional expenses for the steeple, expansive Sanctuary, clock and historic windows, doors, roof and interior. In addition to the 200 year old main building, it has been almost 60 years since the last major renovations to the steeple, and many years since some rooms have had carpet and paint. The 1994 improvements have or will soon wear out.

There is a dedicated reserve account for capital improvements with a balance of $32, 432 and an endowment that will provide $39,235 for capital improvements in 2017. There are projected needs for year 1 of over $100,000 and these reserves can't meet them. Increasing the reserve deposit to $80,000 per year and increasing it annually to reflect inflation is projected to be adequate to meet the anticipated expenses through year 7. Large expenses for the Meetinghouse and repaving the parking lot exhaust the reserves at that time. If that shortfall is avoided or met, the reserves regain a positive balance.

Preface

A capital needs assessment can be an excellent tool to understand the current condition of a building and anticipate its future needs. It can be used as a planning tool both for project scheduling and budgeting. It can also be a real wake up call when a building is facing many repairs immediately or in the near future.

The capital needs assessment does have its limitations. The chief limitation is that it is a broad overview of the building without any great depth. While it does pick up red flags of environmental, structural and life safety problems it is not a comprehensive review and should not be considered a “passing” inspection in those areas. Testing is not done for lead, asbestos or other environmental hazards. Loads are not calculated for each structural member and it relies on a visual inspection and broad rules of thumb for whether current problems exist or future problems are likely. Small maintenance issues are overlooked in preference to those that have more substantial costs.

The inspection is, by definition, visual. This inspection does not open up sill areas to check for rot or wall cavities to look for concealed wiring problems. Sometimes the owner does not provide access to some areas of the building because this would involve removing ceilings or vents or because they choose not to allow me to enter a part of the

building. This limits the scope of inspection accordingly. I have tried to note where this has occurred.

The inspection of older buildings does not utilize current building codes. Almost no older buildings meet current new construction codes. The violations would run pages and their correction would exceed the value of the building in many cases. Code officials generally do not require existing buildings to meet these requirements unless they are undergoing renovations or they are unsafe. The exception to this pattern of "grandfathering" is the life safety code that can be applied to require older buildings to be brought up to current codes for egress and fire safety issues. This enforcement is spotty and unpredictable at the present time. Where there are violations of the code as currently enforced they are cited, but a full life safety upgrade would be far more substantial in scope.

Lifespans of building elements and equipment are based on normal usage and maintenance. Actual lifespans are determined by usage, quality of construction and level of maintenance. As components age their remaining life becomes incrementally easier to determine. The accuracy of the report follows the same path. Distant events can be assumed to be only a likelihood, while current ones are a near certainty (allowing for some items that are suggested or optional).

Some things will still go wrong. In new construction or substantial renovations there are sometimes things that just don't work out. If there has not yet been a shakedown period these are impossible to predict or they probably would never have been done. A share of long life items last longer or shorter than expected, try as they might, only refrigerator manufacturers have perfected planned obsolescence down to the last year. Other things vary by many years and this report tries to use an average. Some "book value" expected useful lives are wrong. Where experience has shown a better value it is used, but there are times when that is not possible.

There are expenses that are not based on things wearing out or needing replacement. Electrical systems, in theory, should last for many decades without expense. Changes in life safety or electrical codes, recalls of equipment, energy efficiency improvements, changes in occupant usage and lifestyle, and low quality devices routinely lead to substantial electrical expenses. Other building elements may follow this same pattern.

In the end, take the Capital Needs Assessment for what it is; a reasonable prediction of future capital improvement expenses based on the current condition of the structure and its components. It provides guidance to the asset manager in planning projects, but more important and valuable guidance to the finance officer/manager in planning reserve deposits for the future. It is setting this deposit amount to adequately provide for the predicted capital needs that should be the outcome of every Capital Needs Assessment.

Introduction

The property is a four building complex at the corners of Pearl St., Clark St. and Elmwood Ave.. There are 2 1/2 acres of grounds including parking areas, lawns and landscaping. The site is generally flat and located in downtown Burlington. There is a substantial amount of leased parking on the site and there are non-church tenants in the three smaller buildings.

The four buildings are:

30 Elmwood Ave. – This is a two story brick building with a slate roof and a full basement. It was constructed as a single family home, but was converted to offices many years ago. It had a fire and was fully renovated about 1994. There have been modest improvements since that time.

34 Elmwood Ave. – This building was originally very similar to 30 Elmwood Avenue. It remains closer to the original condition of the building. It is also offices, but has seen fewer improvements and the interior condition is lower quality.

27 Clarke St. – This is a two story wood building with a slate roof. It was converted to offices within the last ten years. It has been partially renovated since that time. The attached garage was completely replaced recently.

Meetinghouse – This is a meetinghouse or church built in 1816. It had an addition in 1868 and another in 1994. It is a two story brick structure with a wood steeple and

extensive community and office space. The basement is utilized for additional program space. It has a slate roof on the main structure and a membrane roof on the rear additions. The building retains its historic appearance and charm and has had numerous improvements to keep the building up to current standards. There remain many upcoming challenges to continue this standard of maintenance.

Site

The buildings are all on one contiguous site. The Meetinghouse has extensive landscaping and grounds while the other buildings are limited to front lawns and separated mostly by gravel parking areas. There is an asphalt paved circular drive that provides staff parking and handicap parking beside the Meetinghouse. Additional parking is leased behind the building in asphalt and gravel lots.

The site is mostly level. There is a slight grade change from the back to the front. There are fences around the property. This includes an iron fence on the south and east sides, chain link fencing on the west and chain link fencing on a portion of the north.

Notable recent additions to the site include solar panels constructed as a carport and a labyrinth constructed on the side lawn in front of the Meetinghouse.

Hardscape

The paved areas include the semi-circular drive into the property from Clarke Street, the central parking lot, the entry walk to the Meetinghouse from Pearl Street and front walks to the other buildings. There is a gravel parking lot that takes up most of the rear of the site. The driveway from Elmwood Avenue into the site is also gravel.

The asphalt paved areas are in fair to good condition. Potholes have developed, particularly where the asphalt and gravel meet and in the parking around 30 and 34 Elmwood. The 30 Elmwood parking is being expanded onto areas intended to be lawn that are now packed earth. You should consider working with these tenants to either expand the available parking or limit parking to approved areas.

There is also damage to the curbs along the circular drive. These are redstone blocks that have settled over the decades to the point where they no longer serve their purpose. My understanding is the blocks are actually quite tall and could be reset at a higher level and again be effective. This is a major undertaking, as installing concrete curbs would be, and would need to be completed in coordination with repaving the drive and regrading and seeding the adjacent lawn.

Numerous areas are being driven and parked on that were intended to be greenspace. The area adjacent to the Meetinghouse handicap ramp is greenspace that is being used for parking. This area should be paved. You should also consider a long term plan to widen the circle and increase the width of the drive from Clarke St leading behind the buildings. As mentioned above, the 30 Elmwood parking has also encroached. Once expanded, these areas should have curbs to deter further damage to lawns.

The paving dates from 2000. The pavement has an expected life of 25 years and is 16 years old. Patching and sealing cracks can extend this life a few years in the areas in better condition. The area near Elmwood will need repaving in year 2. The balance is budgeted for better curbs, modest widening and repaving in year 7.

The stone walkway to the front of the Meetinghouse was recently rebuilt and is in very good condition. There was a mixture of reused stone and new stone. There is some question about the durability of the older stone, but that is still measured in decades. No capital costs are budgeted.

The walk to the front entrance of 30 Elmwood is asphalt. It is probably from 1994. It is budgeted for replacement in year 7.

The walk to the front entrance of 34 Elmwood is new concrete. It is in very good condition and is not budgeted for replacement.

The walk to the front and side entrances of 27 Clark St. are asphalt. They are in fair condition and are budgeted for replacement in year 7.

The gravel parking area is in good condition. It has been graded regularly and does not have extensive pot holes. This pattern of care and regular installation of additional gravel should continue. Major improvements are budgeted in years 7 and 17.

The driveway between 30 and 34 Elmwood is in fair condition. There are potholes and puddles in this gravel area. This is also the drainage pathway for both the parking lot and the adjacent roofs. This area receives enough traffic that it would be wise to pave it. You may need to redirect runoff elsewhere to avoid drainage problems. You should consider this part of the year 1 paving.

In summary, repairs to potholes and repaving of the area around 30 and 34 Elmwood is budgeted in year 1. General repaving, repairing the gravel, possible widening and curb restoration/construction are budgeted in year 7.

Solar Car Port

The solar car port was completed in January 2012 and consists of a concrete foundation, a steel I beam frame and solar panels mounted to form a partial roof. There is simple lighting under the canopy. It is tilted to the south and has enough overhead room that even large pickup trucks easily fit below the frame. The design seems very sturdy and does not show signs of wear yet. The columns are protected from vehicle and plow damage by large concrete blocks positioned at the columns and ends. They are unattractive and you may want to consider replacing them with a more aesthetic design.

Snow slides off the panels intermittently and can form a large layer on an adjacent vehicle or create a snow bank under the drip line. Parking slots on the north side would avoid this problem.

The solar power system should last 20 years or more without capital expense. It is possible much more efficient panels will come along and justify replacing these. The inverters and controls are likely to eventually require replacement. This is budgeted in year 18. Any future pricing for solar power is entirely guesswork.

The frame will require regular cleaning under the canopy and is more likely to be damaged by vehicles than have ordinary wear. The protective barriers will continue to be essential. No capital costs are budgeted.

Drainage and Grading

Drainage from the site is generally overland flow to the perimeter of the site and then into the city storm drains. There is one storm drain on the east side of the property. It reportedly drains into a drywell that also serves the downspouts on the east side of the roof. The drywell is connected to perforated pipe that forms a leach field. There is no recollection of removing sediment from the collection structure and there are concerns there is damage to the structure or the pipe connecting to it. It does not appear to have adequate capacity to handle the water it receives. The drain should be cleaned in year 1 and further research needs to be done on the cause of backups in the drain. The structure is budgeted for rebuilding in year 7 prior to repaving.

There is another drywell system on the west side of the meetinghouse that collects runoff from the west side of the roof. No problems were reported with this drywell. Far less sediment reaches this system and it may not require work for many years. It will eventually need to be cleaned out, but may not require capital expenses.

Some of the drainage issues are covered in the Hardscape section because changes there will affect the overall drainage. There are also drainage problems along both sides of the Meetinghouse where roof drainage drips to the ground and is trapped adjacent to the building by the eroded ground. This is leading to water entering the building at the side exit from the basement.

This problem can be corrected by creating a path for the roof water to escape the area next to the building and adding drainage stone at the drip line.

The other buildings have less pronounced drip line drainage problems, but there are still low areas next to the Clarke St. building. The solution is similar.

The storm drain should be cleaned out in year 1. The areas at the drip lines should be regraded and the drainage improved in year 1. The overall drainage, especially at the parking areas should be addressed in the paving and parking project in year 7.

Fencing

There are several fences around the property. The most prominent is the iron fence on the east and front of the property. It was installed in 1990. There are areas of the fence that have been damaged by salt and require painting as soon as possible. There are some damaged areas of the fence where spindles have been bent. The bulk of the fence remains in better condition and can be painted over the coming years. The fence is believed have a remaining expected life of over 10 to 20 years, if it is painted and repaired regularly. Painting is budgeted in years 1 and 11.

There are chain link fences on the west side, around the Memorial Garden and on the north property line of 34 Elmwood. The west fence is oldest and is budgeted for replacement in year 8. The Memory Garden fence is in fair condition. You should plan on repairs about every 5 years, more often if you choose to do them yourself as soon as they are needed. This fence should not require replacement during the report period. The fence at 34 Elmwood now has a stockade fence right behind it and serves no purpose. It is not budgeted for capital expenses.

Landscaping

The site has extensive landscaping around the Meetinghouse and more modest plantings on the rest of the site. The trees will require regular trimming to keep them up and there may be trees that require removal during the report period. Generally, it is wise to allow for a significant landscaping project about every 15 years. This would establish new plantings, replant to replace plants that have expired and possibly remove overgrown areas. The budget is wide open, from volunteer labor to large plants and extensive gardens. A round of improvements is budgeted in year 10. The proposed parking lot upgrades will impact lawns and some landscaping A landscaping allowance should be included in that budget. Tree work should be considered maintenance.

Display Cases

There are two glass fronted display cases on the front lawn. One on the right is metal and the one on the left is wood. Both have some damage from normal wear and tear and should be repaired. This includes resoldering the bottom of the metal case and repairing the wood and painting the wood case. This is budgeted in year 1 and repeats in year 11.

Site Lighting

The site lighting includes building mounted lights, pole mounted lights in the circle, a pole light in the Memorial garden and lighting under the Solar Carport.

The building mounted lighting includes a light at the garage and between 30 and 34 Elmwood. These lights are nearly new and not budgeted for replacement.

The pole mounted lights around the circle are also nearly new and not budgeted for replacement.

The pole mounted light in the Memorial Garden is rented and not a capital expense.

The car port lighting was installed with the solar panels and is not budgeted for replacement.

Shed

There is a wood shed mounted against the wall of 30 Elmwood Ave. It has T1-11 plywood walls and an asphalt shingle roof. The walls are badly in need of paint. The roof is sound. It should be painted in year 1. This is maintenance.

Architectural

Exterior

30 Elmwood Ave. – This brick building is in good condition. The brick has some small defects that should be repaired and the wood trim is generally in good condition. There is some minor rot at the north side eaves.

Painting the trim is budgeted in years 5, 12 and 19. A round of repairs is included in each repainting. The current brick problems are more maintenance than a capital expense. A full round of repointing the brick is budgeted in year 13. This will be 40 years since the renovation of the building.

34 Elmwood Ave. – This brick building is very similar to 30 Elmwood Avenue on the exterior. The brick is in very good condition and there is only slight deterioration of mortar. There has been damage to the shingle areas at the gables. The shingle areas of the tower have been replaced but the old shingles remain on the north and south gables.

Painting the trim is budgeted in years 5, 12 and 19. A round of repairs is included in each repainting. Brick repairs fall into the maintenance category. A full repointing is budgeted in year 13.

27 Clarke St. – This is a wood clapboard building. It is in fair to good condition with one major problem. There is extensive rot at the south east corner to the top of the first floor. Water from the entry roof appears to be draining into the wall and soaking the siding, trim, sheathing, insulation, framing and sills. It requires immediate attention! It is impossible to tell the extent of the rot until the walls are opened up, but this is serious. Reconstruction of this area is budgeted in year 1.

The exterior will require painting every 7 years and some minor trim or clapboard repairs are likely with each painting. Peeling can be reduced by controlling the moisture in the building by operating the bathroom fans and sealing the foundation interior with spray foam. This is budgeted in years 2, 9 and 16.

Meetinghouse – The building has a brick exterior with painted wood trim. The brick is generally in good condition. The original building has some mortar deterioration and should be monitored. The decay may accelerate and require repointing during the report period. There is less significant damage to the mortar in the 1868 addition and no damage in the 1994 building. A round of repointing is budgeted in year 11.

The trim was painted in 2007 except for the front façade, which was repainted in 2014. and is due. You should anticipate painting the building every 7 years and there will be some trim repairs and caulking with each round of painting. This is budgeted in years 2, 9 and 16.

The steeple is covered in its own section.

Steeple

The steeple is part of the original building, but was completely rebuilt in 1957. It consists of several sections, some very exposed to the weather and vulnerable to deterioration. In 2004 Keefe and Weisner Architects (KWA) assessed the steeple and other exterior features of the building. Their recommendations are sound, but you should not rely on their pricing. In 2007 Champlain Consulting Engineers (CCS) conducted a thorough inspection and engineering survey of the steeple. Their conclusions were that the "overall condition of the steeple construction is in good condition", but they listed several concerns. They recommended a "comprehensive overhaul of much of the structure…within the next 5-10 years". Most recently Southgate Steeplejacks inspected the steeple in 2014. His recommendations fell into the category of regular repairs and thorough caulking and painting. He does ask you to consider extensive steeple trim replacement that would be better than what was installed in 1957. The exception is the windows.

The lantern level windows need to be removed, disassembled, repaired and reinstalled. New, reproduction sash with an identical appearance is a more cost effective option that will be loathed by preservationists.

Southgate also recommends a review and repairs to the lightning protection. The most recent upgrades were in 1999 and it seems reasonable to confirm that it is still working properly. This is an unusual skill and should be performed by a specialist.

There are also a variety of internal safety concerns for workers in the steeple. These are modest and can be part of other projects.

The steeple is a challenge and will always require attention to its condition and costs to ensure that small problems are addressed and large problems are rectified. You should expect to need additional professional inspections about every 5 years. You should assume that substantial repairs will be made in stages and that they will occur every other year or so until every thing is completed.

My takeaways from the reports:

The steeple is basically sound and was well built.
Only one minor leak in the bell level deck exists
The interior, particularly the lantern level, needs cleaning
The windows in the lantern are decaying and need attention soon
The exposed wood on the bell level needs attention regularly and should be rebuilt soon
There is exposed trim work on the steeple that will tend to trap water and leak if not caulked regularly
Old water stains have not led to major structural rot
Earlier calls for a comprehensive overhaul are probably overblown
Experts can disagree about what to do with a spectacular architectural feature

Here are an updated set of priorities:

1) Repair the damaged Lantern level sashes
2) Repair or replace damaged sections of Bell Level railing
3) Repair the poorly repaired column at the Lantern level with steel
4) Clean Lantern level, replace ladder to the spire, safety repairs
5) Miscellaneous repairs to ensure weathertightness, caulk and paint

6) Review and possible upgrading of lightning protection

Mid term steps include:

1) Treating wood members with sealant
2) Repaint steel members
3) Repoint brick at Upper Clock Tower Level
4) Miscellaneous repairs to ensure weathertightness, caulk and paint
5) Possible extensive wood trim replacement

Longer term steps include:

1) Major repairs or replacement of the steeple copper roofing
2) Major repairs to the weathervane
3) Possible structural repairs from rot that hasn't happened yet.
4) Possible replacement of the flat seam roof, if repairs prove too frequent or difficult
5) Miscellaneous repairs to ensure weathertightness, caulk and paint
6) Clock general repairs, both mechanical and faces

The short term recommendations are budgeted in year 2. The mid term are budgeted in year 7 and the long term in year 15. The whole steeple should be inspected annually by staff or a skilled volunteer to check for leaks and damage to the entire steeple. Any signs of moisture should be addressed before they reach the point of having decay. Bring the steeplejack back in 2019, or five years since the last inspection.

Entries, Porches and Decks

30 Elmwood Ave. – This building has a front porch with a handicap ramp connecting to the deck along the south side of the building. The front porch has some warped and displaced decking. The front steps and deck need paint. The roof ridge cap shingles are starting to disintegrate and should be replaced in year 1. The porch and the adjacent handicap ramp are otherwise in good condition. The decking on the handicap ramp is composite and does not require maintenance. The porch is budgeted for a full round of repairs in year 12.

There is a concrete back step for the building. The step has settled to be out

of level (or it may be the porch that settled) and current codes require a landing outside an exit. Replacement is budgeted in year 6.

34 Elmwood Ave. – This building has a front porch and a rear entrance with a handicap ramp. The front porch was rebuilt around 2003. The skirt enclosing the base of the porch is badly damaged and the lower post in the north west corner needs to be replaced. The center stringer for the steps is damaged and will need to be replaced. The guard around the edge of the porch does not meet current codes for height. These repairs are budgeted in year 1. The roof was replaced in 2003 and has a remaining life of about 10 years. See the Roof section for more. Another round of general repairs is budgeted in year 16.

The rear ramp is also in good condition. It has had new handrails and decking since the last report. It is budgeted for repairs in year 11.

27 Clarke St. – This building has a porch on the Clark Street side and an entry stoop on the south side. The porch was rebuilt in 2007 and is in good condition. The roof was not replaced and is covered in the Roof section. The decking is starting to crack and splinter. The damage is limited, so far. The deck should be stained in year 1 to preserve the wood. Repairs are budgeted for year 9.

The stoop is concrete precast and installed in 2015. They are in new condition. There is a small roof over the entrance that has leaked and caused the extensive damage at the south east corner. Repairs to this structure are included in the repairs planned for year 1.

Meetinghouse – There is a simple, uncovered set of steps at the front of the building, a covered entry to the basement on the east side, a wood porch with steps and a handicap ramp on the east side and a concrete stoop with stairs on the west side. There is also a recessed entrance at the north side of the building.

The front steps have new decking since the last report. They look nice and remain in very good condition. There is some rust forming at the base of the handrails and this needs to be painted every year. No capital expenses are budgeted.

The basement entrance was added to meet egress codes from the basement. It has had problems with water entering the structure and draining into the basement. This is partly due to the drainage around the building and to the location of the entrance directly under the drip line of the large main roof. It has had multiple repairs in the past to correct damage to the structure and leaks. Time to try again. This is budgeted in year 1 and again in year 11.

The side stairs and handicap ramp are in fair condition. Many of the fasteners have rusted and created an unsightly appearance at the stair risers and guards. The decking has been replaced with composite and remains in good condition. The visible framing and ramp guards need to be stained to prevent decay and splintering. The spindles on the ramp guard do not meet current standards for spacing. Some top rails for this guard are warping and will probably need to be replaced. Repairs are budgeted in year 2 and repeat in year 17.

The west side entrance is concrete and receives little use. No capital improvements are budgeted.

Garage

27 Clarke St. – There is an attached one car garage on this building. It was torn down and completely rebuilt in 2013. It should only require painting during the report period.

Windows

30 Elmwood Ave. – This building received wood double glazed replacement windows in 1994. No capital expenses are budgeted.

34 Elmwood Ave. – This building has had its windows replaced in some openings. This is roughly speaking the downstairs and not the upstairs. Exceptions to this are that the windows on the north side in the library were not replaced and the front windows in the reception area were not replaced. Window replacement should be considered a must to retain tenants, provide comfortable space and energy efficiency. Replacements are budgeted as part of the insulation package in year 2.

27 Clarke St. – All the windows in the building have been replaced with wood double pane windows. No capital expenses are budgeted.

Meetinghouse – This building has a myriad of window sizes and vintages. They include the immense and almost priceless sash in the bell tower and smaller and younger models through each of the subsequent additions. All remain in serviceable condition. Keeping them this way will be an ongoing effort.

The large windows in the 1816 and 1868 buildings recently had new storm windows installed. The windows themselves are in good condition. There are concerns about the condition of the sills. They will require restoration, primarily using epoxy to stabilize the wood, not replacement, within a few years. This is budgeted in year 4, but could be completed sooner, if possible.

These windows are budgeted for sash work in years 14 and 15. The storm windows should last beyond the end of the report.

The windows in the 1994 addition are showing wear and tear and are not expected to last centuries like the 1816 windows. It is likely they will need to be replaced during the report period. This is budgeted in year 6.

The sash in the lantern section of the steeple are covered in the Steeple section.

There is damage to the filigree on the half round windows above the side doors on the front of the building. The parts remain, but have come detached. This looks like it can be restored. This process may discover other damage that adds to the scope and cost. This is budgeted, tentatively, in year 1.

Doors

30 Elmwood Ave. – This building has metal insulated entry doors. There is a storm door on the main front door. There is a Bilco style metal hatchway to the cellar.

The storm door is budgeted for replacement in year 9. The Bilco door has extensive rust and has begun to deteriorate. It should be scraped and painted with rust resistant paint in year 1. Its life is limited due to the rust and replacement is budgeted in year 9.

34 Elmwood Ave. – This building has an historic wood front door with an insulated storm door, a metal insulated back door and a metal Bilco style metal hatchway door to the cellar.

The front door will require regular repairs to keep the weatherstripping and door sweep in functional condition. It should be kept as an historical artifact and reminder of how cold and drafty buildings can be. The storm door is budgeted for replacement in year 10.

The back door and the Bilco door should not require capital expenses during the report period. A storm door for the back door would make handicap access much more difficult and is not recommended. No other capital expenses are budgeted for the report period.

27 Clarke St. – There is a metal insulated door with a half light on the Clark Street side and a wood door on the south entrance. Both are out-swinging. There is also a metal Bilco style metal hatchway door to the cellar. The main doors are in very good condition and no capital expenses are budgeted.

There is significant rust on the interior of the Bilco door. It should be scraped and painted to prevent further damage. It will not last and is budgeted for replacement in year 5. The interior door to the basement should be included in a round of weatherization improvements planned for year 3.

Meetinghouse – The Meetinghouse has oversize double doors in the front. There are also matching, closed off entries to either side of the main entrance. There is a basement door on the east side and additional double doors on the entrance to the Parish Hall. There is a north entrance from the back stairs and a west entry door near the kitchenette.

Both sets of double doors were replaced in 2008. No additional capital expenses are budgeted for the report period. Weatherstripping and closers are maintenance costs.

The basement door was new in 2007 and is not budgeted for additional capital costs.

The north and west doors date to 1994 and receive little use. They remain in very good condition. No capital costs are budgeted.

Roofs

30 Elmwood Ave. – This building has a hipped slate roof with dormer windows. There is also an asphalt shingle roof on the front porch. The slate roof will require regular maintenance to repair loose, damaged or missing slate and refinish or repair the metal cap and flashing. Replacement of the front porch roof, galvanized flashing and slate repairs are budgeted in year 1. Additional repairs are budgeted in years 6, 11 and 16.

34 Elmwood Ave. – This building has a hipped slate roof with dormer windows. There is also an asphalt shingle roof on the front porch. The slate roof will require regular maintenance to repair loose, damaged or missing slate and refinish or repair the metal cap and flashing.

There is significant rust on the ridge caps and this will require more extensive repairs than ordinary maintenance. The rust on the valley and edge flashing can be painted to preserve this material but it will need to be replaced. Roof repairs are budgeted in years 1, 6, 11 and 16.

The front porch roof was replaced in 2003. It is budgeted for replacement in year 10.

There is an old flat seam metal roof on the south bay window. It is rusting, but should be salvageable. It should be included in the roof repairs in year 1 and in year 11.

27 Clarke St. – The slate roof is in need of repairs and paint to the metal surfaces. There is an asphalt roll roof on the porch. It is in fair to poor condition. The slate roof is budgeted for maintenance and porch roof for replacement in year 1. Additional rounds of slate repair are budgeted in years 6, 11 and 16.

The garage roof is asphalt shingle. It was new when the garage was replaced. It has an expected life of 25 years and is budgeted for replacement in year 20

The south entry has a flat seam metal roof. It is the cause of the problems at the corner of the building. The sheathing and framing may also be damaged. It is budgeted for repairs and new roofing in year 1.

Meetinghouse – The main roof of the building and front wing roofs are slate. There are membrane roofs over the Parish Hall and 1994 addition. The roof was assessed by KWA in 2004. They note damaged slate in numerous areas and deteriorating hip flashing on the front wing roofs. This was reinforced by my own inspection that noted numerous broken slates spread throughout the roof and a small number of missing slates. The Heffernan report emphasizes problems with the flashing where the base of the bell tower meets the roof and poor quality repairs to locations where nails have lifted.

The general strategy for slate roofs is to make small repairs on a frequent basis rather than letting problems mount. That is the best method in this case. A round of repairs is budgeted in year 1 and then in years 6, 11 and 16. If there is notable damage in intervening years you should arrange for an additional round of maintenance. It would pay to keep using the same slate roofer to build his/her knowledge of the roof and to secure a supply of matching or at least similar slates. One can only hope that complete reconstruction is never required.

The membrane roof on the Parish House and 1994 addition was replaced in 2015. The roof had drain and leak problems prior to replacement and probably went several years beyond when it should have been replaced. It is not budgeted for replacement.

The rear membrane roof has drainage via copper leaders or downspouts. They drain into dry wells on both sides of the building. The leaders remain in excellent condition and the drywells are covered in the Drainage section. No capital costs are budgeted.

Foundation

30 Elmwood Ave. – This building has a stone foundation. It is in very good condition. There is older soft mortar in the joints, but they remain sound. No capital expenses are budgeted.

This basement could be cleaned out and used as storage to replace the overloaded attic storage.

Interior spray foam insulation for the foundation is included in the insulation package.

34 Elmwood Ave. – This building has a stone foundation. It is in very good condition. The exterior shows signs of repointing, probably in 2003. There is older soft mortar in the interior joints, but they remain sound. No capital expenses are budgeted.

Interior spray foam insulation for the foundation is included in the insulation package.

27 Clarke St. – This building has a stone foundation. It is in fair to good condition. There are visible gaps where mortar has eroded from the exterior of the foundation. The moisture problems causing the rust in the Bilco and peeling exterior paint may be related to infiltration of moist air and water through the foundation. Repointing of the exterior of the foundation is budgeted in year 2 and should be completed prior to spray foaming the walls for insulation. You should consider removing and closing off the basement windows as part of this project.

There has been some work on the interior of the foundation to create a more solid footing for the wall, presumably as part of lowering the basement floor and pouring a slab. This is in very good condition and no problems were noted.

There are some finished areas in the basement. They are mold prone and should be removed.

Interior spray foam insulation for the foundation is included in the insulation package.

Meetinghouse – The 1816 and 1868 buildings have stone foundations and the 1994 addition has a concrete foundation. They are all in good condition. The problems of old mortar are possible in this building, too. There is no serious damage at this time and no capital costs are budgeted.

Structure

30 Elmwood Ave. – This is a wood frame building. The framing is generally sound, but there are two cracked floor joists visible in the basement. They should be reinforced. This is budgeted in year 1.

The attic is being used for paper record storage. There is so much up there that it may be overloading the framing at that level. It would be wise to eliminate storage in this area and increase the amount of insulation in the attic. It is possible to create dry storage in the basement to replace it. If you insist on continued use at this level, you need to conduct a structural analysis to determine whether the framing is up to this task. No capital costs are budgeted.

34 Elmwood Ave. – This is a wood frame building. The framing is generally sound. No capital expenses are budgeted.

27 Clarke St. – This is a wood frame building. The framing is generally sound. No capital expenses are budgeted.

Meetinghouse – The three areas of the building are each believed to be built differently. The 1816 building is structural brick with a timber framed roof, the Parish Hall is probably wood framed and the 1994 addition is steel framed. All remain in very good condition. No structural problems were observed or reported. No capital costs are budgeted. The steeple is covered in a separate section.

Attic, insulation and ventilation

30 Elmwood Ave. – This building was insulated in the 1994 renovations. The approximate depth of the insulation is 9" located under the floor boards. The attic could benefit from substantially more insulation to control fuel costs and be environmentally responsible. Current practice is R-60 insulation in attics or about 18" of cellulose. Adding insulation will either preclude using the attic for storage or require modifications to the attic to have a storage area above the insulation. Additional weatherization work in the stairway to the attic will also benefit the energy efficiency of the building. This is budgeted in year 2.

The current practice for older basements is to spray foam the interior up to the underside of the flooring. This seals the box sill and walls from drafts and provides a moisture resistant insulating layer. It is more effective, more moisture resistant and probably more durable than other systems.

Finally, brick buildings are not particularly drafty, but blower door directed air sealing and insulation in other accessible areas would have a significant effect on heating costs.

34 Elmwood Ave. – This building is poorly insulated. There is older rock wool type insulation under the attic floor, but this is inadequate and in poor condition. You should get a full energy audit and complete the recommended measures. At today's oil prices it is possible to justify R-60 insulation in attics or about 18" of cellulose. I suggest closing off the attic to storage and concentrate on reducing heat loss in that area.

Insulating the walls of brick buildings is difficult, but there may be new techniques to address these areas. You may wish to insulate from the inside and plan on patching the walls afterward. The spray foam system described above for 30 Elmwood should also be used here.

Finally, brick buildings are not particularly drafty but blower door directed air sealing and insulation in other accessible areas would have a significant effect on heating costs.

This is budgeted in year 2 and repeats in year 17.

27 Clarke St. – The attic has blown in cellulose insulation from 2007. There appears to be ample space in the attic for additional insulation. This should be accompanied by improvements to the attic ventilation, basement wall spray foam and draft sealing throughout the building.

The wall insulation was also not visible. If wall insulation is not present, the walls should be blown in with dense pack cellulose. This work needs to be timed to follow the wiring improvements recommended in the Electrical section.

This is included in the year 3 improvements to this building and repeats in year 18.

Meetinghouse – This building has several different attics and wall profiles. The original building has an insulated attic over the main ceiling. It contains a mixture of fiberglass and vermiculite. There is a concern that the vermiculite may contain asbestos, since it has been found in vermiculite originating in one mine. If it is positive for asbestos you should not disturb this material by adding additional insulation until the vermiculite is abated. If it is negative you should work with a professional insulator to raise the r-value of this attic to at least R-49 and perhaps as high as R-60. That contractor can also help you identify thermal bypasses where warm air is escaping from the building. One obvious one is the recessed lights, but many others probably exist.

The attic in the Parish Hall was not accessible. Similar advice applies to this area. In this case you should also work with the roofer to ensure that there is adequate ventilation of this space to prevent condensation.

The roof of the 1994 wing is insulated with rigid insulation immediately under the roof membrane.

Wall insulation opportunities are probably very limited. The best strategy is probably to work with the insulation specialist to reduce air infiltration into the building by blower door directed air sealing.

The round of insulation improvements described is budgeted in year 4 and repeats in year 19.

Mechanical and Electrical

Heating, Air Conditioning and Hot water

30 Elmwood Ave. – This building has a Slant Fin gas hot water boiler. It is vented to an older brick chimney that is believed to have been lined. It is about 25 years old. Hot water is supplied by a new gas hot water heater rented from Vermont Gas. The building

does not have a ventilation or air conditioning system. The tenant relies on window air conditioners to cool the building in summer.

The boiler is likely to require replacement soon. It may be possible to spend money on the motors, controls and parts to extend that life. New boilers will not be much more efficient, so replacement would ensure reliability. This is budgeted in year 2.

You can also consider a heat pump system that would provide heat and cooling in one unit. These are advancing rapidly in technology and a central system may be possible for this building. This would eliminate fossil fuel usage in this building. Note that more insulation should precede any heating system replacement.

The hot water heater is rented and is not a capital expense.

Air conditioning is now an expected amenity in offices. You should consider whether you wish to provide a building-wide system in this building. This would be expensive initially, but would attract and retain tenants. This is not included in the capital budget.

34 Elmwood Ave. – This building has a York gas hot air furnace. It was installed in 2003. This is a condensing model and is quite efficient. It is budgeted for repairs in year 2 and replacement in year 12.

There is a Bradford White gas hot water heater. It is rented from Vermont Gas and is not a capital expense.

The building has air conditioning through the combined heating and cooling system. The compressor was installed in about 2003. It is budgeted for replacement in year 7.

27 Clarke St. – This building has a natural gas hot air condensing furnace (above). It appears to be almost 20 years old. It is an efficient model and no problems were reported. It may require extensive repairs soon to prolong its life. This is budgeted in year 1 and replacement is budgeted in year 11. There is a gas hot water heater. Its age is approximately 14 years. It is budgeted for replacement in years 1 and 16.

The gas hot air heating system may be modifiable to include air conditioning. This would involve installing a compressor outside the building and a heat exchanger in the furnace. As mentioned before, air conditioning is a standard item in offices and should be considered necessary to attract tenants to this building. It is budgeted in the year 3 improvements. A second round of compressor replacement is budgeted in year 18.

Meetinghouse – The building is primarily heated by three gas fired Weil McLain GV Gold boilers (above) with a Tekmar controller. There is supplemental heat supplied to the Sanctuary by two York gas fired furnaces. Hot water is supplied by a Rinnai on demand hot water heater.

Variable frequency drives to improve pump efficiency have been installed since the last report.

The boilers were installed in 1999. Generally, boilers require a round of service and controller replacement after about 15 years of operations. This should have happened by now and may have just been several larger repairs. Replacement of the boilers is budgeted in year 8.

The hot air furnaces are run only when the Sanctuary requires extra heat to raise the temperature for a service or event. As a result of this infrequent use, they have an extended life. They are budgeted for an overhaul in year 10 and replacements in year 20.

The water heater remains in good condition. It is budgeted for replacement in year 8.

Ventilation

30 Elmwood Ave. – Ventilation is limited to bathroom exhaust fans. The fans are not tied to timers and may or may not be used by occupants. It would be better to provide a bathroom fan system that operated at a low level full time or for timed periods on a regular basis. The fans are reaching the end of their life and you should investigate replacement fans that meet these criteria. The most popular models are Panasonic Whispergreen. This is budgeted in year 1 and repeats in year 16.

A more elaborate and effective ventilation system would include an air to air heat exchanger and a distribution system. This would further improve the air quality, but is probably prohibitively expensive and disruptive.

34 Elmwood Ave. – Ventilation is limited to bathroom exhaust fans. The fans are not tied to timers and may or may not be used by occupants. It would be better to provide a bathroom fan system that operated at a low level full time or for timed periods on a regular basis. The fans are reaching the end of their life and you should investigate replacement fans that meet these criteria.

A more elaborate and effective ventilation system would include an air to air heat exchanger and a distribution system. This would further improve the air quality, but is probably prohibitively expensive.

27 Clarke St. – This building has bathroom fans for ventilation. The same comments apply as in the other buildings. Replacement of the fans is budgeted in years 3 and 18.

Meetinghouse – The basement of the building has a ventilation system with a Reznor air handler (above) and bathroom fans for each of the bathrooms. The air handler is believed to be 15 years old. It is expected to require some work on fans and motors soon. This is budgeted in year 2. Replacement is budgeted in year 17.

The bathroom fans could be replaced with more efficient and larger capacity models. Since there is already ventilation throughout the building these only need to operate when the bathrooms are in use. Replacement bathroom fans are budgeted in years 1 and 16.

Plumbing

The buildings all receive city water. No problems with the supply were reported. The water supplies within the buildings are copper. New services will only be necessary if you choose to add sprinkler systems to 34 Elmwood and 27 Clarke St.. Copper pipe does not generally require replacement. Any necessary repairs will be budgeted as part of renovations to the existing bathrooms, kitchens and other plumbing.

30 Elmwood Ave. – This building has sewer and drain lines that date from before the 1994 renovations. There are extensive hubbed iron drain lines that are over 50 years old (probably over 75 years old) and are prone to failure. These problems may extend beyond the building to the connection to the sewer main. Replacement of the sewer line (at left) to the main is budgeted in year 12, but could be required at any time or not for decades.

34 Elmwood Ave. – This building has extensive hubbed iron drain lines that are over 50 years old (probably over 75 years old) and are prone to failure. The property manager reports there have been tree roots in the sewer line, a sure sign of deterioration in the sewer main. Replacement of the sewer main and interior hubbed cast iron drain lines is budgeted for year 4.

27 Clarke St. – The plumbing in this building is in better condition than the others. Plumbing costs will be considered as part of the bathroom and kitchen upgrades.

Meetinghouse – There were no problems with the plumbing observed or reported. There is very little visible within the building. The 1994 plumbing plans show that the new wing has its own sewer line to the street. There is also older plumbing, serving the kitchen. The old sewer line remains in use.

The older drain lines are unpredictable. They are budgeted for replacement in year 9.

The drain lines from 1994 are not budgeted for replacement.

Electrical

30 Elmwood Ave. – This building had an entirely new electrical system in 1994. Generally, it is wise to assume that there will need to be electrical upgrades and lighting improvements about every 15 years. In this case there is the opportunity to add LED lighting to the building and make improvements to bring the building up to current codes.

Upgrades are budgeted in year 5. Another round of upgrades is budgeted in year 20.

34 Elmwood Ave. – This building has had some rewiring as recently as 2003. The panel is in good condition. There were no visible wiring defects or problems reported. The wiring and lighting is budgeted for a round of upgrades in year 6.

27 Clarke St. – This building had some electrical work done on the upstairs during the recent renovations. The downstairs remains older and out of date. There should be additional circuits and receptacles for the downstairs and there should be ceiling lighting in every room. This will probably require an upgrade to the panel and other extensive improvements. This is budgeted in year 3 and the upstairs will need updating in year 18.

Meetinghouse – A general electrical upgrade was included in the 1994 expansion. There were no reports of electrical issues. Generally, it makes sense to plan a round of electrical improvements every 15 years and it has been 23. This includes lighting upgrades, changes to circuits and additional code requirements.

The lighting control system is no longer reliable and this is one item needing work. Energy savings from more efficient lighting is the most likely reason for electrical work. The controls are budgeted in year 1 and the lighting in year 6.

Alarms

30 Elmwood Ave. – This building has a full fire alarm system tied to the sprinkler system. It was installed in 1994. The expected life of the panel is 20 years. An upgrade of the system and new panel are budgeted in year 4.

34 Elmwood Ave. – This building has a fire alarm that appears to have been installed since the last report. It has an expected life of 20 years and is budgeted for a new panel and system upgrades in year 17.

27 Clarke St. – This building does not have any alarms.

Meetinghouse – This building has a full fire alarm system tied to the sprinkler system. It had major replacement of the panel, wiring and devices in 2013. These systems have

an expected life of 20 years before requiring a new panel and other updates. This is budgeted in year 17.

The building also has a burglar alarm system. This is in need of updates to remain fully functional. This is budgeted in year 2.

This building has a "lockdown" alarm system. There are panic buttons that activate blue lights and alert the police. It does not have enough alarm lights to cover the entire building. Several more will be necessary. This is budgeted in year 3.

Sprinkler

30 Elmwood Ave. – This building has a sprinkler system. It was installed in 1994. It includes a dry pipe system to serve the attic. The compressor is now 22 years old and at the end of its life. A replacement is budgeted in years 2. There should not be any other capital costs during the report period, but changing codes may require modifications that cannot be anticipated now.

Some dry systems have experienced leaks when water remains in the pipes after testing and causes rust. This requires replacing these sections of pipe. This has not been reported at this site.

34 Elmwood Ave. – This building does not have a sprinkler system. This would be an optional expense. No sprinkler system is budgeted.

27 Clarke St. – This building does not have a sprinkler system. This would be an optional expense. No sprinkler system is budgeted.

Meetinghouse – This building has a full sprinkler system installed in 1994. It remains in very good condition. The only likely expenses are to modify the system when changes are made to the building and to replace the dry system compressor pump. Pump replacement is budgeted in year 14.

Elevator

30 Elmwood Ave. – None.

34 Elmwood Ave. – None.

27 Clarke St. – None.

Meetinghouse – There is a four stop elevator serving the building. It was installed in 1994. No problems were reported. Elevators have an expected life of 30 years before they require extensive improvements. This is budgeted in year 8. Note that the low usage level for this elevator may allow you to extend that period. You should work with your elevator service person to update this evaluation in several years.

Interiors

The office buildings vary widely in both condition and usage. They will need to be treated as individuals as you go forward. For instance, 27 Clarke is somewhat under utilized and the downstairs is in poor condition, but it is affordable and low costs are passed on to the tenants. Should this change?

30 Elmwood Ave. – The building received new interiors in 1994, but they may have been upgraded since then. They remain in very good condition. The most likely expenses will come if tenants move out and the building must be upgraded to attract new tenants. This is budgeted in year 15.

34 Elmwood Ave. – This building (above) has older interiors with the exception of the kitchen and downstairs lavatory. The doors are older panel models. The floors are older hardwood, carpet or vinyl. The interiors are plaster walls and plaster or suspended ceilings.

This building should either receive on-going improvements to retain this tenant or you should plan on significant upgrades when a vacancy occurs. This would include floor refinishing or floor covering replacement, the bathroom described below, modernization of the interior finishes and lighting. This is budgeted in year 6.

If these tenants are likely to stay, you could implement this over a period of several years to keep the building up. This should include floor and carpet on the first floor within a year or two and other upgrades as necessary.

The most noticeable issue in this building is the very dated upstairs bathroom. This is a full bath with old fixtures except for the lower grade vanity. It will require a full renovation to bring it up to a proper standard. This will include 3 fixtures, a fan, floor, lighting, wall repairs to remove old fake tile wainscoting, remove and replace the suspended ceiling and a medicine cabinet/mirror. This is budgeted in year 2.

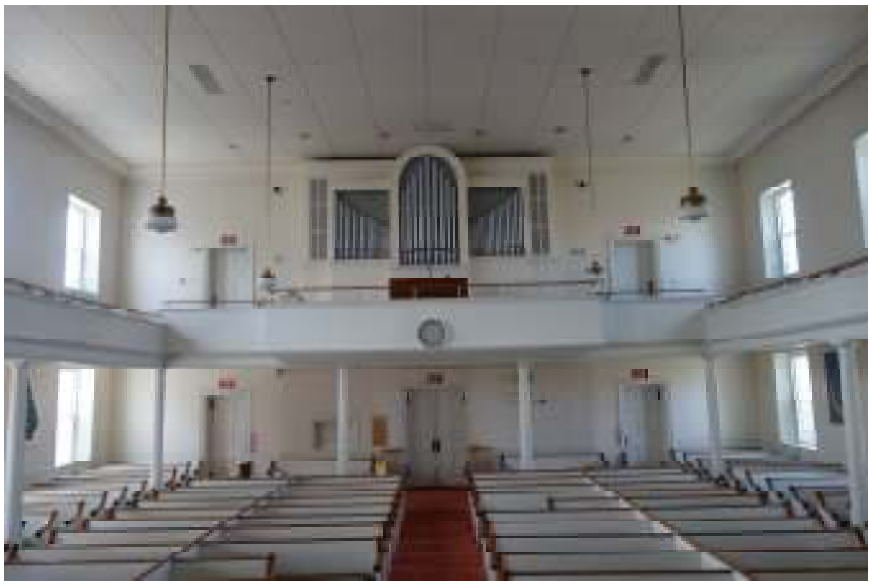
27 Clarke St. – The upstairs of this building was renovated in 2007. It is in excellent condition and improvements are limited to painting and carpets for the report period.

The downstairs (above) has not been extensively renovated since this was a residence and for many years before that. The old kitchen now has a desk in the middle with worn out cabinets and flooring, the bathroom has boxes piled in an unused bathtub. The rooms connect in a row, meaning that the bathroom is accessed by passing through the other offices. At the very least, the downstairs needs new carpet and improvements to bring up the appearance of this space. An ideal solution would include some floor plan changes, new bathroom fixtures, a new kitchenette with appropriate appliances , a wiring and lighting upgrade and new interior doors and finishes. This is budgeted in year 3.

The upstairs is budgeted for improvements to the bathroom and interior in year 11.

Note: the basement of this building includes a carpeted room. It is a mold hazard and the carpet and pad and, possibly the gypsum wall board, should be removed to eliminate any unnecessary risk for mold.

Meetinghouse – This building has numerous areas. There is the Sanctuary and the adjoining entry vestibule, upstairs offices and meeting rooms, first floor parlor, bathrooms and kitchenette, basement kitchen, classrooms, fellowship hall and bathrooms. They have different finish levels, different ages, different purposes and different levels of use.



To rein in the information and make it manageable, I divided the building into 3 parts for painting and carpeting. The Sanctuary and first floor get attention in years 5 and 17. The second floor gets attention in years 1 and 11. The basement gets attention in years 5 and 15, with ceiling tiles in year 15. The kitchen/kitchenette have their own schedule. Further detail is below.

The Sanctuary has a carpeted floor wood and plaster walls, pews with pads and includes the balcony. It is generally in good condition. There is some wall damage in the wainscoting on the east side and missing paint from some pews. The balcony carpet is damaged in some areas. These areas are budgeted for repairs in year 1 and replacement in year 4.

The balance of the carpet has a few remaining years of use and the paint has several years before needing repainting. Carpet and painting are budgeted in year 4.

The pads in the pews are believed to be 11 years old and have an expected life of 15-20 years. They are budgeted for replacement in year 7.

The Vestibule includes the entry, stairs and upstairs halls. Repairs and painting are included in the year 7 projects.

The upstairs includes offices, meeting rooms, hallways and the Whitney Young room. The expenses for this area will be replacement carpeting and painting. Some areas should be repaired and painted in year 1 and the rest in year 10. The year 1 rooms repeat in year 16.

The first floor includes the reception area, hallway, parlor, kitchenette and bathrooms. The kitchenette has cabinets and counters, a commercial coffeemaker, dishwasher, microwave oven and small refrigerator. The refrigerator is budgeted for replacement in year 10. The coffeemaker and dishwasher are budgeted for replacement in year 5. The cabinets are showing some premature wear and will not last many more years. They are budgeted for replacement in year 4.

The bathrooms on this floor were constructed in 1994. Generally they are in very good condition. The fans in the bathrooms are beginning to wear out. They can be replaced with more efficient and quieter models like the Panasonic Whispergreen. This is budgeted in years 1 and 16. The vinyl flooring is budgeted for replacement in year 5. They are included in the general painting cycle.

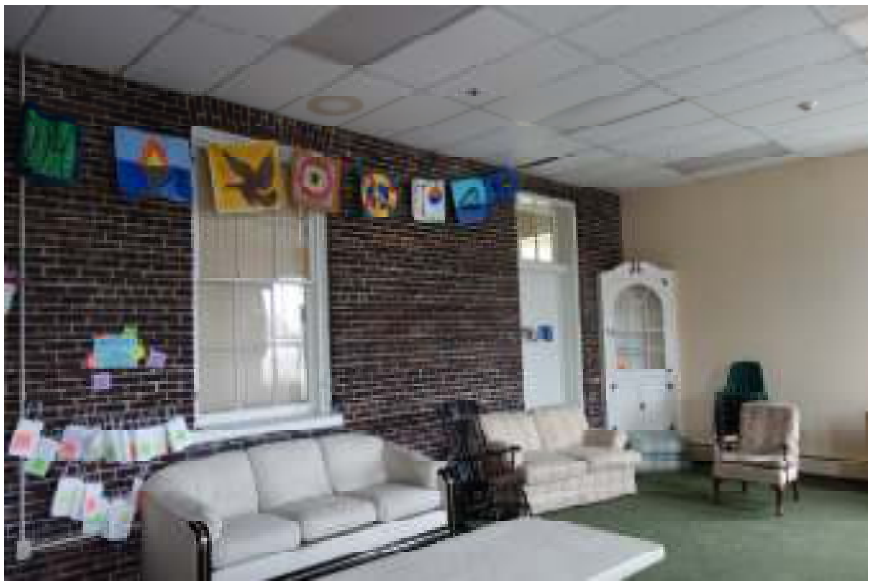
The other areas on the first floor will only require painting and carpeting during the report period. Carpeting and painting are budgeted in years 5 and 15.

The basement level has the main kitchen, offices, classrooms, maintenance room, boiler room, and fellowship hall. They are generally in good condition.

The kitchen is in fair to good condition. The refrigerator was recently replaced and the dishwasher is a commercial grade model that has an extended life. Both are budgeted for replacement in year 13. You should consider a major upgrade of this area within 5 years. This would replace the deteriorating cabinets and upgrade the stove area to have a commercial grade hood and possibly a commercial range. This is substantially more expensive than just cabinet replacement, but would improve the capacity of the kitchen and meet kitchen codes that are now being violated. This is budgeted in year 5.

The interiors in the basement include sheet rock walls and suspended acoustical tile ceilings. They are in good condition. Individual ceiling tiles can be replaced when they are damaged. Eventually a full replacement will be needed to restore the appearance. This is budgeted in year 11. The floor is budgeted for replacement tile in year 7. Painting is budgeted in years 7 and 17. If some areas can be painted each year by staff, it may be possible to postpone hiring painters for these spaces.

There are a washer and dryer in a storage area. They appear to be fairly new. Replacement is budgeted in years 9 and 19. Front load washers are more energy and water efficient than top loaders and are recommended.



Stairways – In addition to the vestibule stairs, there is a stairway from the east entrance to the second floor and a northeast stairway from the basement to the second floor. The east stairway should be included in painting and carpeting replacement in year 5.

The northeast stairwell is not finished and has concrete stair treads and exposed concrete walls at the lower level. Repainting the hallway is budgeted for year 11.

Organ – The organ was fully restored in 2006. Its maintenance and repair or replacement are outside the scope of this report.

Sound System – The Sanctuary includes a sound system for the pulpit. It was recently replaced. No capital costs are budgeted.

Furnishings - The Meetinghouse includes extensive furnishings from simple desks and chairs to antique furniture in the parlor. Many of the pieces will require repair, restoration, reupholstering or replacement during the report period. The budget includes an allowance for furnishings every fifth year. This does not mean you can only spend money those years, it is a way to project expenses that are expected, but somewhat beyond regular prediction, and spread them out over 20 years.

Steeple Clock – The steeple clock receives regular maintenance and repair. There is no predictable useful life for it, but it is likely to require major repairs at some point during the report period. An allowance is budgeted in year 11. Since this is all speculative determining an appropriate amount is mostly guesswork, but educated by the knowledge that anything mechanical wears out and those who can fix unusual mechanical things charge a lot.

Environmental

I have not received any reports on previous testing for environmental hazards in the buildings. Testing is beyond the scope of this report. You should assume that all of the buildings contain lead paint until tested. You may wish to test areas that are likely to host

children, the most vulnerable to lead poisoning. No budget for abatement is included in the financial projections.

27 Clarke St. has some old carpet in the basement. This is medium for mold and retains moisture. It should be removed along with any other damaged or decayed material. If this area is to be used for storage (and even if it is not) you should install an Energy Star rated dehumidifier that drains to the collector used for the furnace condensate. The moisture in the building can be further reduced by improving the drainage around the perimeter of the building to ensure that roof run off moves away from the foundation.

The focus for these buildings should be to prevent the introduction of any hazard by enforcing safe practices by residents and workers. If that is the case there should not be any costs for environmental hazards on this property. The recommended safe practices include immediately removing any inoperable vehicles and not permitting vehicle repair on site; limiting storage of solvents, paints, lubricants, fuels and cleaning products to the lowest possible level; prohibiting herbicides and other poisons from the site; and performing regular inspections to detect leaks or other conditions causing high humidity leading to mold formation.

Recommendations

This property includes 3 older houses and one of the iconic landmark historic buildings in Burlington. The older houses, now offices, require fairly routine, but important improvements to keep them sound and up to reasonable standards for rental offices. Notably, the downstairs at 27 Clarke is shabby and the up stairs bathroom at 34 Elmwood is very outdated. There are also improvements needed to the exteriors including serious rot at 27 Clarke, old windows at 34 Elmwood and other less critical repairs. This is a pattern that can be expected to continue, with steady improvements to the buildings necessary.

The Meetinghouse presents different challenges, with the 1994 addition and renovations aging, a steeple that last had a full renovation in 1957 and a wide variety of interior conditions. It will require annual projects on a significant scale just to keep up and catch up with current projects.

The pressing include leaks at the basement entrance, worn finishes in the upstairs meeting rooms, exterior paint, leaks and rot at the steeple and aging mechanical equipment.

Year 1 – 2016

- Repave damaged areas of parking near Elmwood
- Fix drywell on east side of building
- Repair and paint front fence
- Repair display cases
- Repair rot at 27 Clarke St.
- Repair steps and porch skirt at 34 Elmwood

Replace porch roof at 30 Elmwood
Repair side porch roof at 27 Clarke
Stair porch floor at 27 Clarke
Repair slate roofs on all buildings,
Replace damaged flashing at 34 Elmwood
Repair filigree at front of Meetinghouse arched windows
Replace Bilco door at 30 Elmwood
Major service 27 Clarke furnace
Hot water heater 27 Clarke
Lighting controls for Meetinghouse
Remove damaged carpet from 27 Clarke
Paint upstairs at Meetinghouse
Replace worn carpets in upstairs at Meetinghouse
Replace bathroom fans

Year 2 – 2017

Repair and paint exterior 27 Clarke St
Repair and paint exterior of Meetinghouse
Repair ramp at Meetinghouse
Repair steeple lantern level windows
Repair steeple bell level railings
Paint steeple
Upgrade steeple lightning protection
Replace windows at 34 Elmwood
Insulate 30 and 34 Elmwood
Major service 34 Elmwood furnace
Replace 30 Elmwood boiler
Upgrade burglar alarm at Meetinghouse
Replace sprinkler compressor at 30 Elmwood
Renovate bathroom at 34 Elmwood
Replace selected furnishing in the Meetinghouse

Year 3 – 2018

Electrical upgrades to 27 Clarke
Replace inner basement door at 27 Clarke
Renovate downstairs at 27 Clarke
Repoint foundation at 27 Clarke
Insulate 27 Clark
Air conditioning for 30 Elmwood
Upgrade lockdown system at Meetinghouse

Year 4 – 2019

Repair Meetinghouse window sills
Insulate Meetinghouse
Replace old sewer at 34 Elmwood
Upgrade fire alarm and replace panel at 30 Elmwood

Replace kitchenette at Meetinghouse
Replace kitchenette appliances

Year 5 – 2020
Repair wood and paint exteriors of 30 and 34 Elmwood
Replace Bilco at 27 Clarke
` Electrical upgrades at 30 Elmwood
Paint and carpet first floor of Meetinghouse and Sanctuary
Paint stairwells and replace carpet
Renovate Meetinghouse kitchen, add hood replace stove and floor
Replace Meetinghouse bathroom floors

Year 6 – 2021
Repair back stoop at 30 Elmwood
Replace windows in 1994 addition
Repair slate roofs
Electrical upgrades at Meetinghouse
Renovations at 34 Elmwood

Year 7 – 2022
Repave parking lot, replace curbs
Regrade gravel parking lot
Repair drywell, regrade around buildings
Major repairs to steeple, replace trim, fix flashing, paint
Replace AC compressor at 34 Elmwood
Paint and replace vinyl in Meetinghouse basement
Replace pew pads
Replace selected furnishing in the Meetinghouse

Year 8 – 2023
Replace chain link fences
Replace boilers at Meetinghouse
Replace water heater at Meetinghouse
Overhaul elevator, if needed

Year 9 – 2024
Repair and paint exterior 27 Clarke St
Repair and paint exterior of Meetinghouse
Repair front porch at 27 Clarke
Replace storm door at 30 Elmwood
Replace sewer line at Meetinghouse
Replace Meetinghouse washer and dryer

Year 10 – 2025
Upgrade landscaping and trim trees
Repair entry door and replace storm door at 34 Elmwood

Replace porch roof at 34 Elmwood
Major service Sanctuary furnaces
Electrical upgrades to 34 Elmwood
Replace kitchenette refrigerator

Year 11 – 2026

Repair and paint front fence
Repair display cases
Repoint brick at Meeting house
Repair basement entry at Meetinghouse
Repair ramp at 34 Elmwood
Replace furnace at 27 Clarke
Upgrade interior at 27 Clarke upstairs
Paint upstairs at Meetinghouse
Replace worn carpets in upstairs at Meetinghouse
Paint stairwells and replace treads
Repair steeple clock

Year 12 – 2027

Replace selected furnishing in the Meetinghouse
Repair wood and paint exteriors of 30 and 34 Elmwood
Repair front porch and ramp at 30 Elmwood
Repair metal roofs at bay windows 30 and 34 Elmwood
Replace furnace at 34 Elmwood
Replace sewer at 30 Elmwood

Year 13 – 2028

Repoint 30 and 34 Elmwood
Replace Meetinghouse dishwasher and refrigerator

Year 14 – 2029

Repair 1/2 Meetinghouse windows
Replace sprinkler compressor at Meetinghouse

Year 15 – 2030

Repair 1/2 Meetinghouse windows
Steeple roof repairs and painting
Interior renovations at 30 Elmwood
Paint and carpet first floor of Meetinghouse
Paint stairwells and replace carpet

Year 16 – 2031

Repair and paint exterior 27 Clarke St
Repair and paint exterior of Meetinghouse
Repair 34 Elmwood porch
Repair slate roofs

Replace hot water heater at 27 Clarke
Replace bathroom fans in all buildings

Year 17 – 2032
Replace selected furnishing in the Meetinghouse
Regrade gravel parking lot
Repair ramp at Meetinghouse
Replace basement ventilation at Meetinghouse
Replace alarm panel and upgrade 34 Elmwood
Paint and carpet Sanctuary
Paint and replace vinyl in Meetinghouse basement

Year 18 – 2033
Repairs and upgrades to solar carport
Replace compressor at 30 Elmwood
Electrical upgrades upstairs at 27 Clarke

Year 19 – 2034
Repair wood and paint exteriors of 30 and 34 Elmwood
Replace washer and dryer

Year 20 – 2035
Replace garage roof
Replace Sanctuary furnaces
Upgrade electrical system at 30 Elmwood

Financial Analysis

This property has a current reserve balance of $32,432 and an endowment will provide $39,235 for capital expenses in 2017. If you assume that the endowment contribution will increase by an assumed inflation rate of 2% per year. The reserves can't meet the immediate needs in year 1 and fall further behind with each passing year.

It will take a far larger commitment to funding renovations to keep up with the anticipated expenses. A second run with a reserve deposit of $80,000 initially and increasing to reflect inflation is projected to be adequate to meet the anticipated expenses until year 7. Over $400,000 of expenses for the steeple, repaving the parking lot, and a variety of other items exhausts the reserves.

It would be wise to either increase the annual deposit far further or plan on special fundraising or a loan to cover the expenses likely to occur in about 7 years. Once these expenses are covered, the following years are far more reasonable and should result in adequate reserves.