

INSTRUCTIONS
Capital Finance Survey
Survey Monkey KR93JGB

For each residential and day program site that your agency operates, please complete a separate survey.

Question 1 – Enter your Agency’s four digit ID number shown at the top of the list of addresses previously sent to you.

Question 2 – Review the list of addresses to confirm that all of the addresses of the residential and day programs that your Agency operates are included.

If an address is not included, answer “No” to Question 2 and complete Question 4.

If the address is included, answer “Yes” and complete Question 3 by entering the four digits PROPERTY IDENTIFICATION NUMBER (number will be between 1001 and 9999) from the list.

Questions 3 and 4 – (see above)

Question 5 – If the property is leased from a third party, check the appropriate box and complete Question 6.

If the property is owned by the agency or a closely held or related organization, check the appropriate box and go to Question 7.

Question 6 – Enter the expiration date of the current lease. (If the property address encompasses more than one apartment or unit, enter the date of the lease that expires last).

This is the last question to be answered for properties that are leased from a third party. After answering this question, you will have completed the survey.

Question 7a – Property configuration – check the box that applies.

Question 7b – Enter the total square feet of the building. If the exact square feet of the building is not available, enter the most reliable estimate available.

Question 7c - Enter number of building-stories usable for programming.

Question 7d – Check the appropriate program-type box or boxes associated with the property and enter the square feet for each box checked. If the exact square feet of the building is not available, enter the most reliable estimate available.

Question 7e – Building accessibility – check all boxes that apply.
Definitions:

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- The building is **accessible** if there is at least one no-step entrance accessible to a person using a wheelchair.
- The building is **barrier-free** if an individual who uses a wheelchair can navigate within the home, make use of toilet facilities, etc., without assistance necessitated by architectural barriers such as internal steps, narrow doorways or lack of space to turn a wheelchair within a room.

Question 7f – Answer “Yes” if the property has appraised within the last three years and then go to Question 7g.

Answer “No” if the property has not been appraised within the last three years and then go to Question 7h.

Question 7g – Enter the appraised value of the property and the date of the appraisal.

Question 7h – Enter the Full Market Value (the assessed value of the property after application of the equalization rate) from the Tax Assessment Rolls.

Enter the calendar or fiscal year* of the assessment.

*For Fiscal Year – enter the year that includes the most months - e.g. fiscal year April 1, 20xx to March 31, 20yy – enter 20xx.

If the months in both years are equal, then enter the first year – e.g. fiscal year July 1, 20yy to June 30, 20zz – enter 20yy

Question 8 – Indebtedness – check all the boxes that apply and add appropriate details that include the amount of outstanding indebtedness, the end of the current financial term, the rate and any restrictions on prepayment.

If your agency has incurred indebtedness against several buildings in a single debt issuance (bond sale, mortgage, etc.), state the full amount of the current outstanding debt across all buildings. Indicate the property addresses of the other buildings involved in the outstanding debt, but do not attempt to apportion the debt among the buildings.

Question 9 – Add comments necessary to clarify any responses to the survey.