

Capital Needs Assessment

PRELIMINARY REPORT

Prepared for:



238 Jewett Avenue
Bridgeport, CT 06606

**Augustana Bishop Curtis
Congregate**

Bethel, CT

December 29, 2023



Augustana Bishop Curtis Congregate

Bethel, CT

Augustana Bishop Curtis Congregate is a three-story residential development constructed for congregate/elderly use. The building contains a total of 44 efficiency units (5 of which are designated as accessible) and is located in a mixed-use neighborhood of Bethel, CT. The development was originally constructed circa 1985 and is therefore approximately thirty-nine years of age. Overall, the development is in fair condition. The property has substantive capital needs anticipated in the coming years; a number of systems and components are at or approaching the end of their useful lives. Anticipated near-term needs include asphalt pavement resurfacing, concrete flatwork repairs/replacement (e.g., walkways, steps, patio), site lighting replacement, site drainage improvements (particularly at rear of building), accessibility modifications/improvements, water softener system replacement, emergency generator and underground fuel oil storage tank replacement, building distribution piping repairs/replacement including shut-off valves, fire alarm system replacement, entry intercom system replacement, elevator modernization, building envelope repairs/replacement (e.g., exterior doorway replacement, exterior insulation and finish system (EIFS) recoating and repairs, caulking replacement, etc.), roofing system replacement, common area renovations, and in-unit upgrades (e.g., as-needed passage and closet doorway replacement, floor covering replacement, kitchen cabinetry set replacement, kitchen appliance replacement, and older bathroom fixture and accessory replacement).

For planning purposes, Year 1 of the report is shown as 2024. Total capital costs for the 20-year plan are \$3,430,365. The reserve plan shows a starting reserve balance of \$177,910 (\$4,043 per apartment); no current annual contribution amounts were reported to the reserve account. Annual contributions are shown being established at \$425 per unit (per CHFA guidance). This funding scenario does not provide sufficient reserves to keep pace with the capital costs from Years 1-20. Additional capital of \$2,850,000 is shown in Year 1 to fully fund the plan.

Accessibility/Section 504

As part of this assessment, the common areas and dwelling units at the development were examined for compliance with the requirements of the Uniform Federal Accessibility Standards (UFAS). The development is partially compliant with UFAS at the present time. It should be noted that prior to carrying out any major accessibility modification/improvement work, a qualified design professional should be retained to determine the full scope and cost(s) of any modification/improvement work.

The following deficiencies were noted at the time of the assessment:

- The development lacks an accessible route to site common elements (e.g., bus shelter, community room patio, drop-off area, etc.). Portions of the existing walkways and ramp exceed slope requirements and also contain non-compliant handrails; the ramp serving the community room patio also lacks edge protection. Furthermore, development striping was observed to be faded/weathered, access aisles and parking areas were observed to exceed maximum 2% cross slope requirements, and accessible signage was noted to be non-compliant with UFAS standards. These conditions are shown being addressed as part of asphalt pavement and concrete walkway/ramp resurfacing/replacement work shown in the Site section of the report. Also, parking stall and access aisle restriping efforts (i.e., minimum 96-inch-wide accessible parking stall(s) with 60-inch access aisle (8-feet for van stalls) are shown being addressed as part of planned resurfacing efforts shown in the Site section of the report.
- The main entrance doorway lacks 18-inch maneuvering clearance at the latch side. This condition is shown being addressed as part of concrete flatwork replacement shown in the Site section of the report.
- The elevator cab control panel does not meet UFAS requirements. Modifications/improvements are shown being carried out as part of planned elevator modernization discussed in the Building Elevator section of the report.
- The entry intercom panel exceeds reach range limits (i.e., select push buttons exceed 54-inches in height from the floor surface). These conditions are shown being addressed as part of planned intercom replacement shown in the Building Electrical section of the report.
- Development interior common areas lack visual warning strobes (e.g., common restrooms, laundry rooms, office space, community room, lounges, etc.). These conditions are shown being addressed as part of planned fire alarm system replacement shown in the Building Electrical section of the report.
- Laundry room deficiencies include non-compliant sinks (i.e., lack of adequate front apron clearance), lack of 18-inch maneuvering clearance at the latch side of the entry doors (sinks currently an obstruction to maneuvering clearance), and select laundry rooms lack front-loading washers (request front-loading washers from vendor).
- The ground floor kitchenette sink is not accessible (i.e., countertop exceeds 34-inches in height from the floor surface) and the sink piping is not fully insulated. These conditions are shown being addressed as part of planned kitchenette cabinetry replacement shown in the Building Architecture section of the report.
- The development contains five common restrooms (one on 3rd and 2nd-floor levels, three on 1st-floor level). Deficiencies include lavatory piping is not fully insulated, select lavatories require repositioning to facilitate 29-inch front apron clearance (e.g., 2nd-floor and ground floor restrooms), toilets are not distanced 18-inches centerline from the near wall, toilet rear grab bars are not distanced 6-inches from interior corner (1 of 3 ground floor restroom rear toilet grab bars is not a minimum length of 36-inches), select toilet side grab bars are not distanced 12-inches from the interior corner (e.g., 3rd, 2nd, and 2 of 3 ground floor restrooms), select toilets are not distanced between 17-19-inches high from the floor surface (e.g., 1 of 3 ground floor restrooms), shower faucets are knob-style and require twisting of the wrist to operate, and select paper towel dispensers exceed 54-inches in height from the floor surface.

- The development reportedly contains five units designated as accessible. Unit-level deficiencies noted at the time of the assessment include lack of a visual warning strobe within living areas and bathrooms, closet storage rods exceed 54-inches in height from the floor surface, the kitchen countertop/sink exceeds 34-inches in height from the floor surface, kitchen sink piping is not fully insulated, the kitchen cabinetry set lacks a 30-inch work surface with adequate front apron clearance, the lavatory does not facilitate 29-inch front apron clearance, the lavatory piping is not fully insulated, the side toilet grab bar is not a minimum length of 42-inches distanced 12-inches from interior corner, the rear toilet grab bar is not distanced 6-inches from interior corner, the toilet seat is not distanced between 15-19-inches high from the floor surface, and the toilet is not distanced 18-inches centerline from the rear wall.

Site Improvements

The building is located on a moderate to steeply sloped parcel in a mixed-use neighborhood of Bethel, CT. The building abuts a family development comprised of single-story walk-up buildings (excluded from this study) and shares a common entry roadway for site access (e.g., Simeon Road – reportedly not development responsibility). Asphalt-paved surface parking areas are present along the south end of the building. Concrete walkways and site steps provide pedestrian access throughout the site including to the bus shelter. Pole-mounted high intensity discharge (HID) light fixtures facilitate site illumination. Additional site elements include a metal chain-link dumpster enclosure, metal wire fencing (rear of building), a wood-framed storage shed, entry signage, landscaping comprised of lawn areas, shrubs, and trees, as well as site distribution systems.

The asphalt pavement is in poor condition at the present time. Widespread deterioration in the form of pattern cracking, depressions, and evidence of fatigue were observed. Pronounced rutting was also observed at the dumpster enclosure approach (consideration should be given to installing concrete pavement at this location to better withstand loads from waste disposal trucks). The asphalt pavement appears to be operating beyond the end of its normal expected useful service life; resurfacing costs are shown in Year 1 (including as-needed base material repairs). These costs also include carrying out repairs at the storm water catch basins (concrete deterioration observed at select collars – isolated catch basin reconstruction carried out in recent years). Future costs for preventative maintenance repairs in the form of crack filling, sealcoating, and restriping are shown in Years 6, 11, and 16.

Several areas of deterioration in the form of cracking, unevenness, and potential trip hazards were observed within the concrete site walkways, ramps, and steps. Isolated concrete spalls were observed within the concrete steps providing pedestrian access to the bus shelter (particularly at railing connections). Costs to carry out concrete site element repairs/replacement are shown in Year 1; these costs also include carrying out necessary accessibility improvements to ensure walkways ramps meet slope requirements (further discussion in Accessibility section of report). Metal handrails are present along the concrete walkways/ramps as well as at the site steps; the handrails exhibit corrosion/weathering. Isolated loose/damaged sections of handrails were also observed; the ramp handrails were also observed to be shifted/displaced.

Replacement costs are shown in Year 1, concurrent with walkway/ramp/site step repairs/replacement (including as-needed accessibility improvements). A metal chain-link dumpster enclosure is present at the rear of the property. Future replacement costs are shown in Years 3 and 18. The rear metal wire fencing exhibits age related wear/weathering; replacement costs are shown in Year 1.

Pole-mounted high intensity discharge (HID) light fixtures facilitate site illumination. The light fixtures and light poles appear to be exceeding their normal expected useful service lives. Corrosion was observed on several of the light poles. Costs to replace the light fixtures including refurbishment of the light poles are shown in Year 1. Consideration should be given to installing light-emitting diode (LED) fixtures as an energy efficiency improvement. A wood-framed storage shed is present at the north end of the building. The storage shed exhibits weathering/age related wear; replacement costs are shown in Year 1. Future replacement of the development entry signage is shown in Years 3 and 18. Interim repainting of the signage is shown being handled out of operating accounts.

Localized tree encroachment was noted on the building facades, particularly at the north end of the building. Several displaced tree limbs were also noted at the rear property limit (responsibility of these displaced limbs/landscaping unconfirmed at the present time). Costs to carry out as-needed landscaping repairs/upgrades including tree pruning efforts are shown in Years 1 and 11. Based on discussions with site staff, drainage issues are occurring along the rear of the building which may be contributing to water infiltration issues, particularly at the ground floor level. Evidence of ground floor vinyl composition tile (VCT) moisture damage was noted during the assessment (localized replaced tiles also noted). Pronounced water ponding was also observed along the rear of the building. Costs to carry out drainage improvements along the rear of the property are shown in Year 1, however a further detailed review by a qualified design professional is required to determine the full scope and cost(s) of the required drainage improvement work.

Building Exterior

The exterior walls are predominantly clad in exterior insulation and finish systems (EIFS). Metal-framed full lite glass doors are present at the main entrance, vestibule, as well as the side and rear emergency exits; the remaining service doors are hollow metal models (including north end egress doorway). Exterior caulking is present at window and door perimeters as well as at air conditioning unit sleeves. Exterior windows are vinyl-framed double-hung models containing insulating glass units (IGU's). Building-mounted high intensity discharge (HID) and compact fluorescent light (CFL) fixtures facilitate illumination along the building perimeter.

The exterior doorways appear to be original and are therefore operating beyond the end of their normal expected useful service lives. Corrosion/age related wear was observed on door surfaces and door frames. Replacement of the exterior doors is shown in Year 1. A wood screen door is present at the community kitchen egress and is shown being maintained out of operating accounts during the plan's timeframe. Several areas of cracking were observed within the exterior insulation and

finish system (EIFS) cladding. The condition of the substrate is unconfirmed at the present time; historic leakage issues were reported, particularly along window perimeters. Consideration should be given to carrying out test cuts within the EIFS cladding to determine underlying conditions; this should be discussed during the client review. Costs to recoat the EIFS cladding, including carrying out repairs to areas of cracking, are shown in Year 1 (pending detailed/more intrusive review of building envelope materials). These costs include addressing soffits, rake board, and deteriorated parge coat present on the exposed portions of the concrete foundation walls. Cohesive/adhesive failures were observed within the exterior caulking; isolated water infiltration issues along window perimeters were also reported in the past (caulking replacement carried out at these perimeters). Replacement costs are shown in Years 1 and 16, concurrent with EIFS cladding recoating efforts. Costs to replace the thru-wall A/C sleeves are shown in Year 1, concurrent with building envelope rehabilitation work.

The exterior windows appear to have been replaced since original construction (exact age unconfirmed but are estimated to be approximately seventeen years of age). Future replacement of the vinyl-framed windows is shown in Year 9, based on a twenty-five-year expected useful service life. Interim costs for as-needed replacement of failed and cracked insulating glass units (IGU's) are shown in Years 1-8 (failure of an IGU is ultimately apparent when condensation forms between the glass panes). Management reports select windows are difficult to operate by tenants; these windows are shown being addressed out of operating accounts. Future replacement of the awning installed over the south end patio is shown in Year 14 (recently replaced). Replacement of the building-mounted HID and CFL fixtures is shown in Years 1 and 16, based on a fifteen-year expected useful service life; consideration should be given to installing light-emitting diode (LED) fixtures at these locations as an energy efficiency improvement.

Roofing

The building contains a pitched roof structure covered in architectural asphalt roofing shingles. Aluminum gutters and downspouts facilitate stormwater drainage. An isolated area of active roof leakage was reported at the third-floor level (east common restroom) at the time of the assessment. Furthermore, isolated curled/displaced asphalt roof shingles were noted from available vantage points. In addition, management reports the aluminum gutters/downspouts are not functioning as originally designed. Evidence of moisture staining on exterior wall surfaces due to apparent failed gutters/downspouts were noted at the rear elevation. Costs to replace the asphalt roof shingles and aluminum gutters/downspouts are shown in Year 1.

Lobby – Mail Area

The vestibule and lobby finishes include painted wall and ceiling surfaces, limited carpeting (vestibule), and vinyl plank flooring. The lobby also contains recessed aluminum mailboxes that date to the time of original construction. Costs for repainting efforts are shown in Years 1 and 11. Future costs to replace the vinyl plank flooring (including limited carpeting) are shown in Year 6. Management reports mailbox dividers are problematic at the present time; replacement costs are shown in Year 1.

Community Room/Office

The dining/community room finishes/materials include painted wall and ceiling surfaces and vinyl plank flooring. The lounge/sitting rooms' finishes/materials include painted wall and ceiling surfaces and vinyl composition tile (VCT). The commercial kitchen finishes/materials include painted wall/ceiling surfaces and quarry tile flooring. Office space finishes/materials include painted wall and ceiling surfaces and vinyl plank or vinyl composition tile flooring. Costs for repainting efforts are shown in Years 1 and 11. Replacement of the vinyl plank and vinyl composition tile (VCT) flooring is shown in Years 1 and 16 (localized areas of moisture damage noted, for example within the community/dining room). The quarry tile flooring is shown for replacement in Year 3. The commercial kitchen appliances/equipment include a commercial range and rangehood, refrigeration equipment, and a dishwasher. Costs for replacement are shown based on equipment age, observed conditions, and equipment expected useful service lives. Furthermore, based on discussions with management, the commercial kitchen rangehood does not meet current standards; a qualified professional should be retained to determine the full scope of the rangehood replacement work. Costs for as-needed replacement of the remaining commercial kitchen equipment (e.g., sinks, counters, ice maker, grease trap, etc.) are shown every five years starting in Year 3. The dining/commercial room kitchenette cabinetry set appears to date to the time of original construction; replacement costs are shown in Year 1. The kitchenette microwave is shown being maintained out of operating accounts during the plan's timeframe. Costs to carry out common area furnishing replacement are shown in Year 1 and 11 (majority of furnishings are dated/older).

Common Hallways

Common hallway finishes include texture painted ceilings, painted wall surfaces, and vinyl composition tile (VCT). Areas of abrasions/wear were noted on the painted surfaces (finishes reportedly vary in age, older finishes at upper floors). Costs for repainting efforts are shown in Years 1 and 11. The VCT flooring appears to be approaching and/or operating beyond the end of its normal expected useful service life. Isolated replaced tiles due to moisture damage were noted at the ground floor level. Costs to replace the VCT flooring are shown in Years 1 and 16. Interior common area light fixtures are predominantly comprised of T8 fluorescent tube light fixtures. Limited light-emitting diode (LED) lamps have been installed at select common areas (e.g., community room and lobby area). Replacement of the common area light fixtures is shown in Year 1.

Common Stairways

Common stairway finishes include painted wall and ceiling surfaces and painted concrete treads and landings. Abrasions/wear were noted on these finishes. Costs for repainting efforts are shown in Years 1 and 16. The stairway railings are shown being maintained out of operating accounts during the plan's timeframe.

Common Laundries

Common laundry room finishes include painted wall and ceiling surfaces and vinyl composition tile (VCT) flooring. Wall and ceiling finishes exhibit abrasions/wear. Costs for repainting efforts are shown in Years 1 and 11. Furthermore, the VCT flooring exhibits age related wear (localized damaged tiles noted); replacement costs are shown in Years 1 and 16. The washer/dryers are reportedly leased. As discussed in the Accessibility section of the report, select appliances are not front-loading. Front-loading equipment should be requested from the vendor where missing.

Common Area Restrooms

The building contains five common restrooms (one on Floors 2 and 3, three on Floor 1). Restroom finishes/materials include painted wall and ceiling surfaces and ceramic tile flooring. Restroom fixtures/accessories also include ceramic tile shower stalls (3 restrooms only), lavatories, toilets, grab bars, and mirrors. Costs for repainting efforts are shown in Years 2 and 12; interim repairs/repainting needs are shown being handled out of operating accounts. Costs to replace the ceramic tile flooring are shown in Year 2. Costs to replace the restroom fixtures and accessories are shown in Year 2 (including shower stalls).

Building Boilers

The building's central mechanical room houses the heating and domestic hot water (DHW) generation equipment. A pair of Lochinvar natural gas-fired condensing boilers (500 MBH energy input each) facilitate hydronic heat generation for the building. Augmenting the boilers are fractional horsepower inline boiler water circulation pumps as well as a pair of inline, vertically-mounted hydronic heat circulation pumps (1 currently removed/offline – 2-horsepower rating). The boilers work in concert with indirect-fired domestic hot water (DHW) storage tanks (119-gallon storage tank capacity) and fractional horsepower circulation pumps for DHW generation.

The Lochinvar heating boilers were replaced circa 2015 and are reportedly in good operating condition. Future replacement costs are shown in Year 12, based on a twenty-year expected useful service life. The development contains a water softening system; the water softening system appears to be operating beyond the end of its normal expected useful service life (also reportedly not in operation for several years). System replacement costs are shown in Years 1 and 16. Future replacement of the fractional horsepower inline boiler water circulation pumps is shown in Year 7, based on a fifteen-year expected useful service life. Costs to replace the offline hydronic heat circulation pump are shown in Years 1 and 16; the remaining pump is shown for replacement in Year 13 (motor replaced in recent years including pump rebuild). No problems/concerns were reported with regards to the domestic hot water (DHW) generation system. Future replacement of the indirect-fired DHW storage tanks is shown in Year 11, based on a fifteen-year expected useful service life. Future replacement of the DHW recirculation pumps is shown in Year 11. The DHW mixing valve assembly is shown for replacement in Year 6.

Building Mechanical

Major building systems include the fire sprinkler system (equipped with a backflow preventer), distribution piping for domestic hot and cold water, hydronic heat, sanitary wastewater, and natural gas services, heating, ventilation and air conditioning (HVAC) services.

The building is equipped with a wet fire suppression system (city pressure supply) serving service spaces. This system also includes a backflow preventer, a device designed to keep stagnant sprinkler water from flowing back into the potable water system. The fire suppression system is shown being maintained and monitored during the plan's timeframe. Areas of corrosion were observed within the hydronic heat distribution piping (particularly at stairways) as well as within exposed domestic water distribution piping (boiler/central mechanical room – active leakage observed). Management reports sections of distribution piping have been replaced in recent years due to pipe corrosion/failure. The exact nature and full extent of distribution piping deterioration is unconfirmed at the present time (i.e., unconfirmed if deterioration is related to water quality, installation, material, etc.). Furthermore, management reports several shut-off valves are problematic as well as improperly labeled/identified at the present time. A placemaker allowance to carry out distribution piping and valve repairs/replacement is shown in Year 1, pending a further detailed review by a qualified professional to determine the full scope and cost(s) of required distribution piping repair/replacement work. The source of the systemic pipe failure/corrosion issues should be further reviewed and addressed as part of piping repair/replacement work.

A ductless mini-split system air conditioner facilitates space cooling for the community room. Future replacement costs are shown in Year 6, based on a fifteen-year expected useful service life. Thru-wall air conditioners facilitate zone-type space cooling for select common areas; a limited packaged terminal air conditioner (PTAC) serves the main lobby. Costs for as-needed replacement of these units are shown over seven-year periods starting in Years 1 and 16. A rooftop-mounted ventilation system serves the commercial kitchen; this system is reportedly not in operation at the present time. Based on visual observations from available vantage points, the rooftop-mounted commercial kitchen ventilation equipment appears to be located in close proximity to the boiler flue exhausts. This condition should be further reviewed by a qualified professional and be addressed as may be required. Replacement of the commercial kitchen ventilation equipment is shown in Year 1, based on estimated equipment age and remaining useful life when capital action will be required (commercial kitchen ventilation equipment is also reportedly not in operation). Furthermore, an apparent rooftop-mounted smoke exhaust fan (per mechanical drawings provided) is present at the east end of the building (age and condition of unit unconfirmed at the present time). This exhaust fan is also shown for replacement concurrent with the commercial kitchen ventilation equipment. Management reports the internal exhaust fans are problematic at the present time; costs to replace these exhaust fans are shown in Year 1. The common area cabinet and unit hydronic heaters appear to date to the time of original construction. Replacement costs are shown in Year 1.

Building Electrical

The apartment units are master metered for electricity consumption. A Silent Knight SK-5208 fire alarm control panel monitors hardwired end devices at the development. An entry intercom system regulates visitor access into the building. A diesel-fueled emergency generator (125 kW rating) provides emergency power to key building systems in the event of a power failure. A 2,000-gallon underground fuel oil storage tank also serves the generator. No problems/concerns were reported with regards to the building's electrical systems and components. Future costs to replace the original General Electric circuit breaker panels serving the apartment units are shown in Year 12. It is recommended that periodic infrared thermographic inspections and analysis of utility connections, main switchboard, breaker panels, disconnect switches, etc. be carried out to identify potential 'hot spots' in the electrical equipment that may cause potentially hazardous situations or a major source of system inefficiency. These inspections are shown being handled out of operating accounts. The emergency generator and underground fuel oil storage tank reportedly date to the time of original construction. The underground fuel oil storage tank gauge is reportedly not in operation. Costs to replace the generator and underground fuel oil storage tank are shown in Year 1. Tank removal costs are limited to removal and replacement and assumes that the tank has not leaked. No environmental remediation costs for contaminated soil are included in this report. A future emergency generator overhaul allowance is shown in Year 16. Costs to replace the fire alarm system, including end devices, are shown in Year 1. The intercom system appears to be operating beyond the end of its normal expected useful service life. Costs to replace the intercom system are shown in Year 1.

Building Elevator

A hydraulic-type elevator provides vertical access to each building level. The elevator is reportedly maintained under the terms of a full-service contract. The elevator systems are operating beyond the end of their normal expected useful service lives. Costs to renovate the cab interiors and replace door operators are shown in Years 1 and 16. Costs to modernize the elevator machine room equipment are shown in Year 1.

Building Structural

No problems/concerns were reported with regards to the building's main structural framing systems. These framing systems are shown being maintained and monitored during the plan's timeframe. It should be noted that localized cracking/deterioration was observed within the foundation wall cementitious parge coat. Repair/replacement costs are shown in the Building Exterior section of the report.

Dwelling Units

The development contains a total of 44 apartment units comprised of 44 one-bedroom, one-bathroom units. During the course of the assessment, OSI was given access to a total of 16 units, accounting for over 35% of the total. A sample of this size is felt to be sufficient given the age, tenancy, design and location of the development.

Unit Living Areas

Units are accessed via metal-framed metal doors from the common hallways. Interior passage and closet doors are hollow core wood models. Unit wall and ceiling surfaces are painted. Living area flooring is predominantly comprised of vinyl composition tile (VCT); an isolated ground floor apartment unit contains vinyl plank flooring. No problems/concerns were reported with regards to the unit hallway entry doors. Future replacement costs (including emergency door release systems) are shown over a five-year period starting in Year 6. Costs to carry out as-needed replacement of the unit passage and closet doors are shown in Years 1-10 (management reports closet doors are problematic at the present time; closet doors are displacing from tracks). Costs to replacement of the unit living area vinyl composition tile (VCT) flooring (predominantly original) are shown over three-year periods starting in Years 1 and 16.

Unit Bathrooms

Unit bathrooms contain ceramic tile flooring. Bathroom fixtures and accessories include one-piece fiberglass tubs and surrounds, roll-in fiberglass shower stalls (accessible units), wall-hung sinks, predominantly non-low-flow toilets, metal and laminated particleboard medicine cabinets, exhaust fans, and standard bathroom accessories. The bathroom flooring and fixtures predominantly date to the time of original construction. Costs to replace the ceramic tile flooring are shown over a ten-year period starting in Year 4. Concurrently, costs to replace the one-piece fiberglass tubs and surrounds, fiberglass shower stalls, and wall-hung sinks are shown in Years 4-13 (consideration should be given to installing tub cuts at units where tub heights are problematic for tenants). Costs to replace the toilets are shown in Years 1-3 (appear to be original where observed). Select bathroom medicine cabinets/accessories appear to have been replaced over the past several years. Costs to replace the medicine cabinets, accessories, and exhaust fans are shown in Years 1-10 (corrosion noted along base of select metal medicine cabinets).

Unit Kitchens

Unit kitchens vinyl composition tile (VCT) flooring. Unit kitchens also contain wood cabinetry sets with laminated particleboard countertops, electric two burner cooktops, frost-free refrigerators (varying cubic feet), and ceiling-mounted exhaust fans (present above cooktops). The majority of the VCT flooring is original; replacement costs are shown over three-year periods starting in Years 1 and 16. Approximately ten of the electric cooktops have been replaced within the past several years. Costs to replace the original cooktops are shown in Years 1-3 (concurrent with kitchen cabinetry replacement). The newer cooktops are shown for future replacement in Years 11 and 12. Annual costs to carry out as-needed replacement of the refrigerators are shown starting in Year 1. Replacement of the ceiling-mounted kitchen exhaust fans is shown in Years 1-3.

Unit Electrical

Apartment units are serviced by common electrical circuit breaker panels present within the electrical service rooms; these panels are discussed in the Building Electrical section of the report. Each apartment unit contains a hardwired, battery-backup, local ring smoke detection device. Unit living areas and bathrooms also contain an emergency call assistance pull cord (local ring system). Unit-level light fixtures are predominantly T8 fluorescent tube or compact fluorescent light (CFL) fixtures. Localized newer/replaced light-emitting diode (LED) fixtures are also present, particularly within unit bathrooms. Costs to replace the smoke detection devices (including installation of combination smoke/carbon monoxide detectors) are shown in Years 1 and 11. Costs to replace the emergency call assistance pull cords are shown in Year 1 (including limited common area devices). Replacement of the unit-level light fixtures is shown in Year 1; consideration should be given to installing light-emitting diode (LED) fixtures as an energy efficiency upgrade.

Unit Mechanical

Each apartment unit contains hydronic baseboard radiators governed by thermostatic radiator valves. Management reports select radiator valves have failed within the past several years. Annual costs to carry out as-needed radiator/radiator valve repairs/replacement are shown starting in Year 1. Electric unit heaters facilitate space heating within the unit bathrooms. The heaters vary in age and condition; annual costs for as-needed replacement of the heaters are shown starting in Year 1. Thru-wall air conditioners (8,000 BTU) facilitate space cooling for the apartment units; the air conditioners are reportedly tenant responsibility. The A/C sleeves are included with exterior wall repair work shown in the Building Exterior section of the report.

Capital Needs Summary

Future capital actions are based on useful life expectations and assume continued effective maintenance and physical management. The timing of actions by system (including quantities and costs) is also presented in the CHFA Capital Needs Worksheet.

Additional Notes:

1. The Physical Inspection of the property was conducted on December 18th, 2023. Additional information was provided to ON-SITE INSIGHT by site staff and others. OSI was represented on this assignment by Matthew Chown. We would like to thank site staff for their assistance.
2. Regular updates of this plan are recommended to ensure careful monitoring of major building systems and to adjust the program to accommodate unanticipated circumstances surrounding the buildings, operations, and/or occupants.
3. Information reviewed in preparation of this report included historic data on capital activities and costs, original plans, and current prices for capital actions.
4. No evaluation of environmental concerns, including but not limited to asbestos containing materials (ACMs), lead-based paint, chlorofluorocarbons (CFCs), and polychlorinated biphenyls (PCBs) has been undertaken as part of this assessment.



View of pattern cracking and evidence of fatigue within asphalt pavement as seen at entry roadway



Additional view of pattern cracking/deterioration within asphalt pavement



View of pronounced cracking/rutting within asphalt pavement as seen at dumpster enclosure approach – consideration should be given to installing concrete pavement to better withstand loads from waste removal trucks



View of catch basin concrete collar exhibiting spalls/deterioration



Several areas of unevenness and potential trip hazards observed within concrete flatwork



View of concrete steps and railings providing access to bus shelter – concrete spalls and corrosion of metal railing connections observed



View of section of metal railing at walkway leading to bus shelter/Simeon Road exhibiting damage/wear



View of typical pole-mounted high intensity discharge (HID) light fixture facilitating site illumination – several light poles exhibit corrosion/weathering



View of rear of building – reportedly poor drainage occurs along portions of this perimeter and may be conducive to water infiltration issues reportedly occurring at ground floor level



View of metal chain-link dumpster enclosure



View of bus shelter located west of development – shared with abutting family property



View of wood-framed storage shed located at north end of building – age related wear



View of development entry signage



View of Lochinvar natural gas-fired condensing boilers facilitating hydronic heat generation for building – 500 MBH energy input each



View of vertically-mounted hydronic heat circulation pump, 2-horsepower rating, 86.5% efficiency – motor replaced in 2021 and pump reportedly rebuilt; second pump requires replacement (difficultly obtaining quotes reportedly by management)



View of water softening system serving development – currently offline for several years



View of indirect-fired domestic hot water (DHW) storage tanks – 119-gallon storage capacity each



View of domestic hot water mixing valve assembly



View of fractional horsepower domestic hot water circulation pump



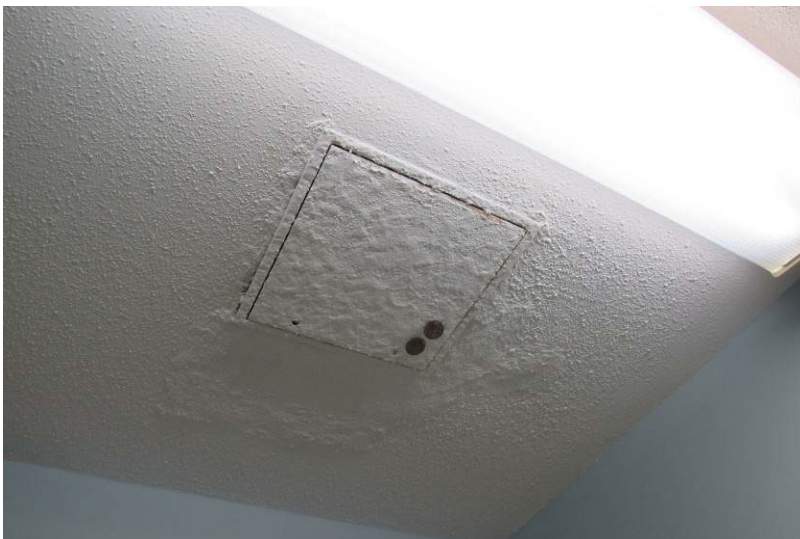
View of boiler flue exhaust; note flues appear to be in close proximity to commercial kitchen ventilation equipment; this condition should be further reviewed and addressed as may be required (i.e., ensure flues are appropriately distanced from kitchen air intake system)



View of pronounced corrosion of hydronic heat copper distribution piping as seen at stairway cabinet heater – sections of distribution piping have been replaced in the past due to failure (common areas and apartment units)



Active domestic water supply piping leakage issues occurring within boiler room



View of finished ceiling apparent moisture damage due to distribution piping failure as observed at ground floor level



View of typical General Electric circuit breaker panel serving bank of 4 apartment units



View of diesel-fueled emergency generator present at rear of building and serving key building systems in the event of a power failure – 125 kW rating – diesel fuel is stored in a 2,000-gallon underground storage tank



Emergency generator fuel gauge monitor reportedly problematic/not functioning



View of Silent Knight SK-5208 fire alarm control panel monitoring hardwired end devices at building



View of entry intercom system regulating visitor entry into building – note select push buttons exceed acceptable UFAS reach range limits



View of elevator machine room equipment – maintained under the terms of a full service agreement



View of elevator cab interiors – plastic laminate wall panels and vinyl flooring



View of typical building architecture as seen at rear of building – note exterior insulation and finish system (EIFS)



Majority of exterior doorways exhibit corrosion at door frames, abrasions, and finish wear



View of emergency egress doorway exhibiting age related wear



Several areas of cracking observed within EIFS cladding



View of voids within exterior insulation and finish system (EIFS) as seen at front elevation – these areas are susceptible to moisture infiltration and subsequent damage to underlying building components/materials



View of discoloration/moisture staining on EIFS cladding as seen at rear of building – appears to be due to failed downspout/gutter



View of apparent displaced section of concrete foundation wall cementitious parge coat as seen at front of building



View of deteriorated exterior caulking at window perimeter (cohesive/adhesive failures)



Exterior windows are vinyl-framed double-hung models containing insulating glass units (IGU's) – no widespread failed or cracked IGU's noted during the assessment; isolated windows replaced in past due to water infiltration issues



View of sample of attic space conditions – note fiberglass insulation



View of architectural asphalt roof shingle conditions as seen from available vantage points – active roof leakage reported at east end of building



Isolated curled/uplifted shingles noted from available vantage points



View of typical common hallway finishes – painted wall and ceiling surfaces, vinyl composition tile (VCT) flooring



View of typical common stairway finishes – painted surfaces reportedly exceed ten years of age



View of main lobby finishes – note vinyl plank flooring



View of recessed aluminum mailboxes – mailboxes are reportedly original; dividers are problematic



View of third floor lounge finishes



View of community room finishes and equipment



View of sample of commercial-grade kitchen equipment – note dishwasher is reportedly problematic



Additional view of commercial-grade kitchen equipment



View of commercial-grade refrigeration equipment – 2007/2009 date of manufacture



View of typical laundry room finishes and equipment – washer/dryers are reportedly leased



View of typical common restroom finishes and fixtures (1 of 5 total restrooms present at development – 3 contain shower stalls)



View of typical unit living area finishes – note air conditioners are tenant responsibility; majority of VCT flooring is original/older



An isolated unit contains newer vinyl plank flooring



View of typical unit kitchen finishes and equipment; limited cooktops have been replaced since original construction



View of accessible unit kitchen finishes and equipment



View of typical unit bathroom finishes and fixtures



View of accessible unit bathroom finishes and fixtures



Accessible units contain roll-in shower stalls



View of unit-level intercom panel regulating visitor access into building – positioned within acceptable UFAS reach range limits

Site Improvements

Number of Units:	44
Total Square Feet:	30,216
Default Inflation Rate:	3.0%

Augustana Bishop Curtis Congregate • Capital Needs Assessment • © On-Site Insight

Common Hallways

Owner Sponsor Name:	Diocese of Bridgeport
Project Name:	Augustana Bishop Curtis Congregation
Project City / Town:	Bethel, CT

Current Year:	2024
Budget Effective Date:	January 1st, 2024
Report Date:	December 29th, 2023

Number of Units:	44
Total Square Feet:	30,216
Default Inflation Rate:	3.0%

[illegible]

Common Stairways

Number of Units:	44
Total Square Feet:	30,216
Default Inflation Rate:	3.0%

Augustana Bishop Curtis Congregate • Capital Needs Assessment • © On-Site Insight

Common Laundry

Number of Units:	44
Total Square Feet:	30,216
Default Inflation Rate:	3.0%

Augustana Bishop Curtis Congregate • Capital Needs Assessment • © On-Site Insight

Common Area Restrooms

Number of Units:	44
Total Square Feet:	30,216
Default Inflation Rate:	3.0%

Augustana Bishop Curtis Congregate • Capital Needs Assessment • © On-Site Insight

Building Boilers

Owner Sponsor Name:	Diocese of Bridgeport
Project Name:	Augustana Bishop Curtis Congregation
Project City / Town:	Bethel, CT

Current Year:	2024
Budget Effective Date:	January 1st, 2024
Report Date:	December 29th, 2023

Number of Units:	44
Total Square Feet:	30,216
Default Inflation Rate:	3.0%

Augustana Bishop Curtis Congregate • Capital Needs Assessment • © On-Site Insight

Unit Living

Number of Units:	44
Total Square Feet:	30,216
Default Inflation Rate:	3.0%

Augustana Bishop Curtis Congregate • Capital Needs Assessment • © On-Site Insight

Comprehensive Capital Needs Assessment Schedule

Unit Bathrooms

Owner Sponsor Name:	Diocese of Bridgeport
Project Name:	Augustana Bishop Curtis Congregation
Project City / Town:	Bethel, CT

Current Year:	2024
Budget Effective Date:	January 1st, 2024
Report Date:	December 29th, 2023

Number of Units:	44
Total Square Feet:	30,216
Default Inflation Rate:	3.0%

	Component	Current Total Replacement Cost	Expected Annual Rate of Inflation	Current Age	Total Expected Useful Life	Initial Replacement Year	Planned Expenditures by Year																												
							Code	Emergency	Code	Deferred	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	Revitalization				
											2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043					
1	Walls					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
2	Ceiling					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
3	Lavatory / Vanity					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
4	Toilet					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
5	Tub / Surround					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
6	Floor					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
7	Accessories					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
8	Lighting Features					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
9	Exhaust Fan					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
10	GFI Outlet					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
11	Other					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
12	Other					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
13	Other					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
14	Other					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
15	Other					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
16	Other					2024				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
17	Unit Bathroom Ceramic Tile Flooring - Replacement	52,800		39	40	2027				0	0	0	5,770	5,943	6,121	6,305	6,494	6,689	6,889	7,096	7,309	7,528	0	0	0	0	0	0	0						
18	One-Piece Fiberglass Tubs/Surrounds - Replacement	165,000		39	40	2027				0	0	0	18,030	18,571	19,128	19,702	20,293	20,902	21,529	22,175	22,840	23,525	0	0	0	0	0	0	0						
19	Wall-Hung Sinks - Replacement	33,000		varies	40	2027				0	0	0	3,606	3,714	3,826	3,940	4,059	4,180	4,306	4,435	4,568	4,705	0	0	0	0	0	0	0						
20	Toilets - Replacement	13,650		39	40	2024				4,550	4,687	4,827	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
21	Metal & LPB Medicine Cabinets - Replacement	7,700		varies	20	2024				770	793	817	841	867	893	919	947	975	1,005	0	0	0	0	0	0	0	0	0	0						
22	Bathroom Accessories - Replacement	5,500		varies	20	2024				550	567	583	601	619	638	657	676	697	718	0	0	0	0	0	0	0	0	0	0						
23	Exhaust Fans - Replacement	13,200		varies	20	2024				1,320	1,360	1,400	1,442	1,486	1,530	1,576	1,623	1,672	1,722	0	0	0	0	0	0	0	0	0	0						
24	Accessibility - Reposition Lavatories, Insulate Piping, Provide Compliant Grab Bars & Toilets	10,000		ADD	20			4	10,000	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
25																																			
26																																			
27	Annual Planned Expenditures						0		10,000	7,190	7,406	7,628	30,290	31,199	32,135	33,099	34,092	35,115	36,168	33,705	34,717	35,758	0	0	0	0	0	0	0	0					
28	Cumulative Reserve Balance						177,910		131,810	1,565,172	1,421,331	1,292,798	1,235,657	1,207,191	1,146,747	1,102,386	1,056,018	759,813	718,286	586,295	430,411	385,105	402,072	421,816	193,868	163,877	124,722	124,898	146,121						

Unit Kitchens

Number of Units:	44
Total Square Feet:	30,216
Default Inflation Rate:	3.0%

	Component	Current Total Replacement Cost	Expected Annual Rate of Inflation	Current Age	Total Expected Useful Life	Initial Replacement Year	Planned Expenditures by Year																												
							Code	Emergency	Code	Deferred	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	Revitalization				
											2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043					
1	Walls					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
2	Ceilings					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
3	Floors					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
4	Cabinets					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
5	Countertops					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
6	Sink					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
7	Kitchen Exhaust Fan					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
8	GFI Outlet					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
9	Vent Hood					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
10	Refrigerators					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
11	Stove					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
12	Range					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
13	Dishwasher					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
14	Disposal					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
15	Other					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
16	Other					2024					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
17	Unit Kitchen Vinyl Flooring - Replacement	15,730		varies	15	2024					5,243	5,401	5,563	0	0	0	0	0	0	0	0	0	0	0	0	8,169	8,414	8,666	0	0					
18	Wood Cabinetry Sets - Replacement	165,750		39	25	2024					55,250	56,908	58,615	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0					
19	Refrigerators - Replacement	28,600		varies	15	2024					1,907	1,964	2,023	2,083	2,146	2,210	2,277	2,345	2,415	2,488	2,562	2,639	2,718	2,800	2,884	2,971	3,060	3,151	3,246	3,343					
20	Cooktops (Original) - Replacement	25,500		39	20	2024					8,500	8,755	9,018	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
21	Cooktops (Newer) - Replacement	7,500		varies	20	2034					0	0	0	0	0	0	0	0	0	0	5,040	5,191	0	0	0	0	0	0	0						
22	Exhaust Fans - Replacement	13,200		varies	20	2024					4,400	4,532	4,668	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
23	Accessibility - Kitchen Cabinetry Modifications/Improvements	23,750		ADD	20				4	23,750	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
24																																			
25																																			
26																																			
27	Annual Planned Expenditures							0		23,750	75,300	77,559	79,886	2,083	2,146	2,210	2,277	2,345	2,415	2,488	7,602	7,830	2,718	2,800	2,884	11,139	11,474	11,818	3,246	3,343	0				
28	Cumulative Reserve Balance							177,910		131,810	1,565,172	1,421,331	1,292,798	1,235,657	1,207,191	1,146,747	1,102,386	1,056,018	759,813	718,286	586,295	430,411	385,105	402,072	421,816	193,868	163,877	124,722	124,898	146,121					

Unit Mechanical

Owner Sponsor Name:	Diocese of Bridgeport
Project Name:	Augustana Bishop Curtis Congregation
Project City / Town:	Bethel, CT

Current Year:	2024
Budget Effective Date:	January 1st, 2024
Report Date:	December 29th, 2023

Number of Units:	44
Total Square Feet:	30,216
Default Inflation Rate:	3.0%

Augustana Bishop Curtis Congregate • Capital Needs Assessment • © On-Site Insight

Appendix A: Statement of Delivery

Our Capital Needs Assessment (the "CNA" or the "Report") on the subject property is delivered subject to the following terms and conditions:

1. The report and analysis may be relied upon by you as a description of the observed current conditions of the building and site improvements, only as of the date of this report, and with the knowledge that certain limitations and exceptions within the report that are the reflective of the scope of services as defined in our contract. Although care has been taken in the performance of this assessment, ON-SITE INSIGHT, Inc. (and/or its representatives) makes no representations regarding latent or concealed defects that may exist and no warranty or guarantee is expressed or implied. This report is made only in the best exercise of our ability and judgment. Conclusions reached in this report assume current and continuing responsible ownership and competent property management.
2. We have undertaken no formal evaluation of environmental concerns, including but not limited to asbestos containing materials (ACMs), lead-based paint, chlorofluorocarbons (CFCs), polychlorinated biphenyls (PCBs), and mildew/mold.
3. Conclusions in this report are based on estimates of the age and normal working life of various items of equipment and/or statistical comparisons. Actual conditions can alter the useful life of any item. When an item needs immediate replacement depends on many factors, including previous use/misuse, irregularity of servicing, faulty manufacture, unfavorable conditions, Acts of God and unforeseen circumstances. Certain components that may be working when we made our inspection might deteriorate or break in the future without notice.
4. To prepare this report, we used historic data on capital activities and costs, blueprints (when available), and current prices for capital actions. We have not independently verified this information, have assumed that it is reliable, but assume no responsibility for its accuracy.
5. Unless otherwise noted in the report, we assume that all building components meet code requirements in force when the property was built.
6. If accessibility issues are referenced in the report, the site elements, common areas, and dwelling units at the development were examined for compliance with the requirements of the Uniform Federal Accessibility Standards (UFAS), and for Massachusetts properties, the Massachusetts Architectural Accessibility Board (AAB). The methodology employed in undertaking this examination is adapted from a Technical Assistance Guide (TAG-88-11) titled "Supplemental Information About the Section 504 Transition Plan Requirements" published by the Coordination and Review section of the U.S. Department of Justice Civil Rights Division, and the AAB Rules and Regulations, 521 CMR effective July 10, 1987. The Guide also incorporates the requirements of UFAS, published April 1, 1988 by the General Services Administration, the Department of Defense, the Department of Housing and Urban Development, and the U.S. Postal Service. Changes in legislation and/or regulations may make some observations moot.
7. Response Actions and estimated costs of responses were developed by ON-SITE INSIGHT, Inc. If additional structural work is necessary, costs for some Response Actions may exceed estimates. Whenever the Response Action is to remove, reposition, or modify walls, a competent structural engineer should be retained before any work is done, because such investigation may disclose that a Response Action is either more costly than estimated, or is not possible.
8. Conclusions reached in this report assume current and continuing responsible ownership and competent property management. Any unauthorized reliance on or use of the report, including any of its information or conclusions, will be at the third party's sole risk. For the same reasons, no warranties or representation, express or implied in this report, are made to any such third party. Reliance on the report by the client and all authorized parties will be subject to the terms, conditions and limitations stated in the contract Terms and Conditions. The limitation of liability defined in the Terms and Conditions is the aggregate limit of ON-SITE INSIGHT's liability to the client and all relying parties.
9. Regular updates of this plan are recommended to ensure careful monitoring of major building systems and to adjust the program to accommodate unanticipated circumstances surrounding the buildings, operations, and/or occupants.