PLEASE NOTE:

This STAY Plan is for demonstration purposes only. To protect client identification and very personal information, this public example of a STAY Plan is a composite of information from multiple persons and includes name changes.
EXECUTIVE SUMMARY

The client, 64, is a single woman in excellent health and the retired owner of a ballet company. She has lived in her Ashburn home since 1986, and has made lasting improvements to the home and property, including a significant ground-floor addition in 2003 that added, at the rear of the home, a new master bedroom suite and interior hot tub room. She enjoys her home, landscaped yard and in-ground pool, and has paid off the mortgage. She commissioned the ESH group to prepare this STAY Plan to help her realistically assess the viability of remaining in her home for as long as practicable.

A STAY Plan provides a written detailed plan of what it would take to remain in the home as one ages, frequently described as aging-in-place. It takes into account the location, layout and condition of the home, as well as the homeowner's age, general health and physical ability to stay in the home. It provides a prioritized set of rough order of magnitude cost estimates and the rough timeframes to do specific enabling projects around the home over the next ten years. It provides an objective personalized assessment of the feasibility of remaining in the home, under what circumstances and for about what cost.

BOTTOM LINE ASSESSMENT

The client should be physically able to stay in the home for at least the next ten years and, barring any significant changes in health and medical status, for the next 20-30 years. The home is in very good shape and is well suited for the relatively modest changes recommended in order to assure a safe and continued residence in the home with a high quality of life. There are no apparent showstoppers. No outside help with essential and important activities of daily living are foreseen at this time.

This STAY Plan identifies approximately $52,000 in one-time investments over the next ten years, equating to an average of about $5,000 per year. This would be in addition to annual expected routine major maintenance and repair expenses of $6,000 to $12,000, likely a continuation of current homeowner experience.

The single largest one-time investment recommended for the client is the construction of a portico at the front door, for about $19,000 in the 2025 timeframe. While not absolutely necessary to remain in the home, it would provide the client with invaluable peace-of-mind with respect to activities at the front door. Activities from home delivery services are expected to increase. A portico would provide a more user-friendly front entrance for the client and for first responders. It would also provide shelter and protection for the installation of a keyless front door and a video surveillance system. The investment would also add to the market value of the home.
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SECTION 1. INTRODUCTION

Background

We are each faced with making important decisions during our lifetimes, involving topics such as education, career, family and residence. But as we advance in years, we typically find ourselves having put down roots, having made progress towards paying off the mortgage, and notionally planning to remain in our home for as long as practicable. This desire to stay put is strongly based on emotion, and the rational decision regarding if and when to relocate is often deferred until life’s circumstances help to make that decision for us. During the developmental period of those “circumstances”, which could be quite lengthy, there is often a commensurate and noticeable drop in one’s Quality-of-Life (QOL), followed by an associated narrowing of choices in available living arrangements. But there is a way to objectively assess, in advance, the feasibility of staying in one’s home, also known as aging-in-place. And its result is called the STAY Plan.

Value of the STAY Plan

The STAY Plan is a personal planning document that provides the resident (usually the client) and/or family advisor with timely information to help with making the difficult but necessary informed decision about the choice to stay in the home or not, or to stay in the home for a while longer if certain physical things could be done to the home. Each STAY Plan provides:

- A detailed comprehensive analysis with a resulting plan to continue living in that home in a safe and satisfying manner for at least the next ten years and, baring any significant changes in health and medical status, for the next 20-30 years.
- A current assessment and ten-year forecast of the resident’s abilities to perform activities vital to independent living, including outside help with some of the activities
- A room-by-room functional analysis of potential challenges to identified vital personal activities, followed by actionable, mitigating projects
- A ten-year roadmap of mitigating projects, identifying scope, timeframe and approximate cost
- A 30-year forecast of routine major costs to maintain this home
- A 2-D floorplan of the house, identifying personal activity locations
- 3-D visualizations of key mitigating projects to assist with project implementation
Scope and Process

Each STAY Plan is unique to the individual client(s) and that client’s current home. The STAY Plan considers the general physical health needs of the client, and assesses the ability of the client to perform all of the necessary nine Activities of Daily Living (ADL, Appendix C), such as bathing and eating, in the applicable and appropriate portions of the home. The STAY Plan incorporates measures wherever possible to help ensure that the client can continue to perform an additional nine key tasks and activities that are instrumental for functioning as an independent adult (Instruments of Activities of Daily Living, IADL, Appendix D), such as managing medications and using the phone. As may be necessary, the STAY Plan will include recommendations that the client obtain appropriate assistance from others with performing certain ADLs and IADLs; an occupational therapist will help with this portion of the planning. (TheESHgroup protects the individually identifiable health information of its clients, following the HIPAA Privacy Rule of Public Law 104-191.)

Finally, the STAY Plan considers up to nine personality-driven QOL activities (PDQA, Appendix E) that enhance the QOL of the client, such as quilting or computer-aided genealogical research. By taking into account the activity locations and the specific layout and condition of the home, the STAY Plan informs what it would take for the client to remain in the home, under what circumstances, and for about what/when/how much for major mitigating projects around the home, in a prioritized and chronological order.

To assist with understanding and assessing the client’s home, theESHgroup creates an interactive 3-D model of key rooms of the home; a digital hand-held scanner is used early in the conduct of each STAY Plan. This digital model also serves as the basis for creating an analytical floorplan of the home. The completed STAY Plan includes some screengrabs of 3-D visualizations as an intuitive aid for some of the home’s mitigating projects.

It is important to note that no one can accurately predict the future. The assessors of this STAY Plan rely upon their knowledge of general and statistical human health parameters as a typical person ages, coupled with the known physical health needs of the client, to make an approximate informed ten-year forecast of future challenges associated with ADLs, IADLs and PDQAs. One-time mitigating projects are all planned for accomplishment during this ten-year forecast. This forecast is augmented with a 30-year forecast of routine major costs associated with maintaining the home. A STAY Plan is predicated on reasonably anticipated future health needs, and not worst-case scenarios. It is therefore recommended that this STAY Plan be considered for updating should the physical needs of the client significantly change.
It is also important to note that this STAY Plan is the ESHgroup’s professional assessment of what it would take to remain in the home without sacrificing QOL. Cost estimates for projects to mitigate current and forecasted gaps in ADLs, IADLs and PDQAs are rough orders of magnitude (ROMs) and should not be construed as either firm construction estimates or cost proposals, but as an overall aid to the difficult decisions about remaining in the home. To preclude appearances of conflicts of interest in the preparation of STAY Plans, the ESHgroup represents that it is definitely not a home-improvement contractor.

**Investment Strategy**

To the extent possible, STAY Planning aims to minimize the client’s long-term expenditure of funds to remain in the home, carefully balancing the client’s QOL with the future resale value of the home. Mitigating projects for the next ten years are identified and planned to ensure the continuation of ADLs, IADLs and of anticipated need. For example, extensively re-landscaping the backyard would not be included in the STAY Plan, as it would likely serve no identifiable purpose towards ADLs, IADLs or PDQAs. But, the modernization of a 10-year old bathroom to include ADA (Americans with Disabilities Act) features 10 years from now, for a currently 65-year old client, would be included. Similarly, the reroofing of a home 25 years from now would be included, as an unavoidable result of deciding to remain in the home for at least another 25 years.

The primary focus of a STAY Plan is the physicality of the house to enable the continued independent living of the client in the home. Mitigating projects are therefore of physical changes to the house. In the event that such projects must be complemented by outside human help to continue with certain ADLs, IADLs or PDQAs, the nature of those complementing services will be described as a decision-making aid to the client and/or family advisor.
SECTION 2. SITUATIONAL CONSIDERATIONS

Background

The client is a single female, 65 years of age, widowed and living alone. She is recently retired as the sole owner of a ballet instruction school. She has a son who lives about 8 miles away, and a daughter in Europe. She drives her own car, has no pets, and values her time in her home.

The client is active in her church for one-two events per week. She enjoys swimming in her in-ground pool, and relaxing in her indoor hot tub. She hosts large gatherings at her home several times per year, indoor and outside. She continues to be involved in ballet as a regional examiner for students.

She typically makes a weekly trip to the grocery store, post office and gas station. Weekends include visits to nearby family and church. A typical day for her involves being a night owl and sleeping late. She does her own laundry and house cleaning, checks emails and does on-line shopping.

The client’s special enjoyments include gardening, eating out and traveling. She enjoys late night television and listening to music. Evenings frequently include reading, doing jigsaw puzzles and sewing. She enjoys cooking and baking.

Preferences

The client has expressed a desire to stay in her home for as long as possible. She has worked hard for 31 years to personalize it and has developed strong routines in the home. She has paid off the mortgage and it seems financially sensible to her to stay in the house.

The client has options available to her other than staying in the home. She could reside in an upscale nearby retirement community; she could also elect to live with one of her children.

Current General Health

A general health assessment was performed during a personal interview with the client, accomplished by inquiring about her ability to perform each of the numbered ADLs (Appendix C), IADLs (Appendix D) and PDQAs (Appendix E). The results are shown in the personal interview of Appendix F. This client currently is adjudged to be in excellent health and to have no challenges with any ADLs, IADLs or PDQAs. She is a very sound candidate for remaining and thriving in her home for a long time.
Table 2-1 Current Challenges with ADL, IADL and PDQA Activities. Refer to Appendices C, D and E for descriptions of respective numbered activities.

<table>
<thead>
<tr>
<th>Item of Challenge (2018)</th>
<th>ADL#</th>
<th>IADL#</th>
<th>PDQA#</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Future General Health

For the ten-year forecast of future challenges associated with ADLs, IADLs and PDQAs, the client is expected to closely follow standard health trends for an older adult from 65 to 75 years of age. The client should anticipate experiencing a gradual increase in challenges associated with the below-listed specific items of challenge. Mitigating actions to these challenges are incorporated into this STAY Plan where feasible and practicable.

Table 2-2 Ten-Year Forecast of Challenges with ADL, IADL and PDQA Activities. Refer to Appendices C, D and E for descriptions of respective numbered activities.

<table>
<thead>
<tr>
<th>Item of Challenge (2019-2028)</th>
<th>ADL#</th>
<th>IADL#</th>
<th>PDQA#</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transferring to/from sitting position (chairs, couch, toilet, car seats)</td>
<td>5, 6</td>
<td>1, 7</td>
<td>1, 5, 6, 7, 8</td>
</tr>
<tr>
<td>Walking (working in the yard, and trip/fall avoidance)</td>
<td>7</td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>Climbing stairs (going up and down the stairs, including the four steps from the family great room towards the master bedroom, and trip/fall avoidance)</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participating in Leisure Time Physical Activities (ballet and modern dance, hosting)</td>
<td>7</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Hearing (listening to music, TV and voices on the phone/Skype)</td>
<td></td>
<td>4, 7</td>
<td>3, 4</td>
</tr>
<tr>
<td>Vision (reading and doing crosswords; seeing television and computer screen; driving; discerning trip hazards)</td>
<td></td>
<td>4, 5, 7, 8</td>
<td>4, 5, 6, 7, 8</td>
</tr>
<tr>
<td>Using hot tub</td>
<td></td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>
SECTION 3. THE HOME

General Description

The client’s house is situated in a quiet residential neighborhood with established trees. An elementary school is within an easy walking distance. The neighborhood is a part of the City of Ashburn. The usual services and utilities are reliably provided by a combination of city and commercial entities. A good selection of banking, shopping and restaurants are within a 5-10 minute drive. The Ashburn Health Center, a freestanding 24/7 emergency medical facility, is 1.5 road miles away.

The house is a two-story 1964 Colonial style house, with an attached 2-car garage on the right side, and with a substantial 2003 ground floor addition to the rear of the house. The house currently consists of 5 bedrooms, 3 full bathrooms and 2 half bathrooms, totaling about 3,200 SF. There is an indoor hot tub room, plus an outside 20x40-foot in-ground pool. A generous double-wide driveway on a gentle slope leads to the garages. There is no basement. A general layout of the ground floor of the home is shown for reference purposes as Figure 3-1.

The house is of standard wood frame construction, with exterior facings of fiber cement shingles and brick. The floorplan of the house has the main living areas on the ground floor, including laundry, kitchen, living room, dining room, great room with fireplace, hot-tub room, and master bedroom and bathroom. The second floor contains four bedrooms and two full bathrooms.

General Condition

The house, in general, has been well maintained during the more than 30 years that the client has owned and lived in this home. The original part of the house, built in 1964, has been mostly updated, including the HVAC system, bathrooms, two of the four upstairs bedrooms, and the combined kitchen/breakfast area. Reflecting a desire to remain in her home for as long as practicable, the owner (now 64) in 2003 extended the ground floor at the rear of the house to include a new master bedroom and bathroom, an interior hot tub room and a large family great room with gas fireplace. Overall, a lot of planning and effort has been invested in advance of aging in place.

The house itself is structurally sound, and generally well maintained, reflecting a pride of ownership. Large home care items notably include:

- Reroofed the entire house in 2017 with 25-year architectural shingles.
- Replaced the two garage doors and their electric lift motors in 2016.
- Replaced all original house windows with double-pane low maintenance windows in about 2000.
- There are two HVAC systems, both from the 2003 timeframe.

Copyright 2018 by HomeSpan
There are two water heaters (one gas, one electric), both from about 2003.

The client commissioned the ESH group to prepare this STAY Plan to help her realistically assess the viability of remaining in her home for as long as practicable.

**Functionality**

The client enjoys living in her home, working to maintain the landscaped yard and in-ground pool, where she prefers to spend time when the weather cooperates. The architectural functionality of the house adds to this enjoyment, providing her with easy access to the outdoors directly from the master bedroom, the hot tub room, or the great room, in addition to the standard exits from the front door and the garage.

The interior functionality also generally serves the client well. All of her ADLs take place on or from the ground floor, as well as the in-home IADLs. The ground floor consists of spaces at slightly different, but easily navigable, elevations, defined by clearly delineated room thresholds. As reflected in the Personal Interview Record (Appendix E), the client currently requires no assistance with ADLs, IADLs or PDQAs, facilitated by the ease of traverse on the ground floor from one activity area to another. Of note, the family great room provides her a common space for sewing, reading, watching television, and listening to music (some of her PDQAs).

The second floor provides two bedrooms for visitors and two ex-bedrooms for storage. The client infrequently has a need to visit the upstairs. If the need should ever arise, one of the upstairs bedrooms would make ideal quarters for a resident caregiver.

Section 4 of this STAY Plan provides an examination of where the client’s ADL, IADL and PDQA activities currently take place in the home, how she traverses safely among them, and a vision of ensuring the safe continuance of these activities for at least the next ten years. Sections 5 through 13 provide detailed analyses of the home’s individual functional areas, and identify projects to ensure the continuance of ADL, IADL and PDQA activities. And to conclude, Section 14 provides important financial and budgetary information to execute this STAY Plan.
Figure 3-1 General Layout of House, ground floor. (Not to scale)

This graphic was hand-drawn to protect client identity
SECTION 4. STAY ELEMENTS

As described in Section 1, the scope of a STAY Plan includes an overarching analysis of the client’s ability to perform three elemental types of activities of daily living (ADLs, IADLs and PDQAs) in specific and appropriate locations in the home. These three STAY Elements for the client are presented in detail and in priority order below. Each Element includes a vision of how to maintain and/or improve upon the current satisfaction of the activities and safely continue them for at least the next ten years (the practicable limit of health forecasting).

STAY Element One: Essential ADL Spaces

Those STAY elements that directly support ADLs are absolutely essential for self-care, and must be provided in a manner that satisfactorily matches the client’s current and future physical capabilities. As shown in the numbered listing of ADLs in Appendix C, the essential ADL spaces can be identified as being in the client’s personal living, dining, bedroom and bathroom areas, plus any stairs or connecting pathways that may be needed to inter-access these essential areas.

Figure 4-1 shows the location of each of the nine essential ADL activities (primary and alternative) in the client’s home, plus the primary connecting pathways (ADL #7). The tables in Section 2 show that there are currently no challenges with any ADL activities, with only a gradual increase in ADL challenges forecast over the next ten years. Because of this, it is envisioned that the instances of alternative ADL activity locations can continue until at least 2028, such as the use of the hallway half bathroom, the formal dining room, or the front family room reading area. Should the client’s physical capabilities significantly change, the ADL locations would be served by the primary locations and pathways that are in close proximity to the master bedroom and bathroom. For the eating of meals, continue the practice of eating informally in the breakfast nook and formally in the dining room; the breakfast nook location with its tile floor and proximity to other essential ADL spaces is envisioned for the partaking of all meals should the client’s physical capabilities demand it.

A vital part of a STAY Plan regards the ability of first responders to quickly and easily gain access to and remove the client, as may be necessary. Ambulance stretchers are typically 24 inches wide and 58 inches long. Fortunately, there are three pathways into the client’s home, depending on the location of the client, that are easy to traverse in case of an emergency, shown as orange (ambulance color) paths on Figure 4-1. However, should the client ever need a wheelchair, even temporarily, the pathway out the front door should be modified to provide the minimum travel clearance of 36 inches and doorway clearance widths of 32 inches, as recommended by ADA guidelines. The doorway from the breakfast nook to the front hallway and toward the front door is only 30 inches wide.
Figure 4-1  STAY Element Activity Locations, ground floor. (Not to scale)

This graphic was hand-drawn to protect client identity.
**STAY Element Two: Important IADL Spaces**

Those STAY elements that directly support IADLs, while not as essential as those for ADLs, are still important to be provided in a manner that satisfactorily matches the client’s current and future physical capabilities if at all possible, for the client to maintain a functionally high QOL. As shown in the numbered listing of IADLs in Appendix D, the important IADL spaces can be identified as being primarily in the home’s garage, laundry, kitchen, family and great room areas, plus any stairs or connecting pathways that may be needed to inter-access these important areas.

Figure 4-1 shows the location of each of the nine important IADL activities in the client’s home, plus the necessary connecting pathways. The tables in Section 2 show that there are currently no challenges with any IADL activities, with only a gradual and slight increase in IADL challenges forecast over the next ten years, primarily in IADL activities involving vision, hearing and transferring to/from a sitting position. To mitigate the challenges, it is envisioned that opportunities be taken when presented to enhance the IADL activity locations and paths shown on Figure 4-1 in the areas of improved lighting, seating, and ease of access and manual operation. The IADL pathways, shown in blue on Figure 4-1, are all consistent with ADA guidelines of having a minimum travel clearance of 36 inches and doorway clearance widths of 32 inches. The two doorways from the garage to the kitchen, however, do not currently lend themselves to being navigated easily by walking aids or a wheelchair, and should be modified when the opportunity or need arises.

Should the client’s physical capabilities significantly change, such that the IADL activities become too difficult or too unsafe for the client to perform, all or any of these activities could be outsourced to others, such as to family members or a compensated assistant. Before resorting to that extreme, however, there would

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**Vision for STAY Element One:**

- Prioritize efforts to maintain/enhance ability to support ADLs in primary activity areas of ground floor master bedroom, master bathroom, great room, and breakfast nook.
- Maintain/enhance functionality of primary ADL paths. Keep them unobstructed, well lit, and sure-of-foot.
- Maintain/enhance functionality of first responder access paths. Keep them unobstructed and well lit. Improve the path out of the front door.
- While not yet needed, look for opportunities to widen doorway from breakfast nook to front hallway to provide minimum ADA clearances.
be a number of work-arounds available, depending on the affected IADL activity. For instance, driving could be done by a service such as taxi or Uber; shopping for food could be done more on-line and delivered directly to the home; and a maid service could do housework and/or laundry. At this point, no such work-arounds are envisioned over the next ten years.

Vision for STAY Element Two:

- Leverage normal repair and maintenance events to enhance task lighting, ease of operation and reach, reduce trip and slip hazards, improve situational security awareness.
- Replace chairs with those that provide a steady framework from which to assist with getting up and down. Avoid wobbly, swivel types of chairs.
- Improve the efficient functioning of the home office, where shopping and financial management take place. Replace computer with a larger flat screen and a larger keyboard. Improve the task lighting and declutter the work surface area. Minimize the quantity of hard-copy billing.
- Improve security and dexterity operations at the front door. Consider installing a portico for all-weather operation of front door and for sheltered placement of an expected increase in direct delivery of packages. When replacing front door, consider a keyless feature and no storm door. Install a home closed-circuit video and announcing system at the front door, interconnected to motion sensors and lighting. This vision would also well serve first responders.
- When replacing the wireless phone system, get one with larger buttons and ID screens.
- When replacing laundry machines, consider ones that are front opening and on pedestals for ease of access and operation.
- Reorganize kitchen for ease of access and operation of daily and frequent tasks.
- Improve the ability of the garage to serve as an all-weather access to the home from the car, and vice versa. Park the vehicle on the right side, to permit an unencumbered path by the driver to the inside of the house. Link the garage door opener to the operation of the garage main overhead lighting fixture. Deconflict the two doors leading from the garage to the kitchen.
**STAY Element Three: Desired PDQA Spaces**

And lastly, those STAY elements that support PDQAs are desired to be provided in a manner that satisfactorily matches the client’s current and future physical capabilities if feasible, practicable and affordable, to continue providing the client with the highest possible unique joys of living. As shown in the numbered listing of PDQAs in Appendix E, and as located in Figure 4-1, the PDQA spaces are scattered throughout much of the home, including the garage and surrounding garden areas, plus the necessary stairs and connecting pathways that may be needed to interconnect these desired areas.

The tables in Section 2 show that there are no current challenges with any PDQA activities, with only a gradual and slight increase to all of PDQA challenges forecast over the next ten years. The challenges primarily involve vision, hearing, manual dexterity and transferring to/from a sitting position. To mitigate the challenges, it is envisioned that opportunities be taken when presented to enhance PDQA activities in the areas of improved lighting, seating, and ease of access and manual operation, some of which are co-located with ADL and IADL activities. The ADL and IADL pathways, shown in red and blue on Figure 4-1, would continue to ensure safe access to PDQA activities consistent with ADA guidelines. The two doorways from the garage to the kitchen remain as awkward impediments to the client’s joy of driving (PDQA #5), and should be modified when the opportunity or need arises.

Should the client’s physical capabilities significantly change, such that a PDQA activity becomes too difficult or too unsafe for the client to step-wise stop performing solo, it could reluctantly be dropped as a “desired” activity. Before resorting to that extreme, however, there would be a number of work-arounds available, depending on the affected PDQA activity. For instance, maintaining the hot tub could be outsourced, and the tub’s cover could become motor operated. Also, hosting could be simplified by having the affair catered, and the party spaces could be cleaned in advance with maid service. At this point, there are no such extreme work-arounds envisioned over the next ten years.
Segue to Detailed Sections

In this Section, each of the three STAY Elements have been analyzed and overarching visions made to help ensure the safe continuance of ADL, IADL and PDQA activities for at least the next ten years. What follow in Sections 5 through 13 are detailed analyses of the home’s individual functional areas to incorporate these visions into resulting, actionable projects. The scope, location, ROM and timeframe for each of these projects are rolled up into Section 14 of this STAY Plan.
SECTION 5. LIVING AREA (ESSENTIAL)

Identifying the Living Area

Great Room, plus its connecting pathways to the breakfast nook, family room and the short stairs and hallway up to the master bedroom door. For this house, it also includes the half-bath that primarily serves living area, and the pathway from the Great Room to the half-bath.

The Great Room contains a gas fireplace with stone hearth, floor and wall-mounted storage cabinets, large-flat screen television, surround sound stereo, bar, recliners, couch, coffee table and end tables. Lighting in this high-ceiling room is with numerous recessed and indirect spotlights.

For fire safety, there is a functional hard-wired fire and smoke detector in the hallway that leads to the master bedroom. There is also a functioning battery-operated fire and smoke detector in the short hallway leading to the front door.

The hallway leading from the Great Room to the master bedroom door contains several closets, one of which houses the electric water heater for the 2003 addition.

Potential Challenges and Vision of Changes

1. The Great Room contains recliner type chairs for the client to watch TV, listen to music and do occasional reading. These are deep chairs and are currently a bit difficult to get in and out of. These chairs date to 2003 and will likely need to be replaced within the next five years, and at least one of the new chairs should be specified for better ease of use.

2. The Great Room has a marble tile floor leading up to the double French doors going to the outside. The floor is a slip hazard when wet, coming in from outside. A small rubber-backed area doormat should be used at this doorway.

3. The carpeted stairway on the stairs leading to the master bedroom are only four, but are noticeably steep, with treads and risers not in conformance with ADA standards. A sturdy handrail is installed. There is not currently a usage problem, but it could be a source of a future accident. There does not appear to be a practical solution to the existing setup, but improvements to the treads’ traction and visibility would help to avoid slips and falls.

4. Section 4 points out that the doorway from the breakfast nook to the hallway, and leading to the hallway half-bath, is only 30 inches wide.
not currently a pathway problem, but if the area were in the future to be updated (say, with a kitchen or main stairway renovation), then consider having that doorway widened to at least 32 inches, in keeping with ADA standards.

5. The single reading lamp in the Great Room is 60 watts with a fabric shade. For reading a magazine or TV Guide in the adjacent chair, this is currently a difficulty. Consider upgrading the fixture to one with a brighter bulb.

6. Should the opportunity arise to replace the toilet in the half-bath, it is recommended that it be with a “comfort height” of 17-19 inches, measured from the finished floor to the top of the seat. This will aid with getting up and down from the toilet, frequently mentioned as a challenge as one ages.

7. Even without the current physical need for use of a grab bar in the half-bath, it is recommended that ADA-compliant horizontal grab bar be installed in the near future for use as a fall-prevention measure. Select a low-maintenance bar of a finish in keeping with the surrounding fixtures.

Vision of Changes for Section 5:

- A better ease-of-use chair for the Great Room. ROM = $750. About 2021.
- Upgrade the short four-step stairway leading from the Great Room. Replace carpeting surfaces with something of higher traction. Illuminate steps. Provide a visual contrast on tread nosings. ROM = $1500. About 2021.
- Widen main hallway doorway to 32 inches. Includes relocating breakfast nook light switch to other side of doorway. ROM = $2500. About 2028.
- Upgrade side-table reading lamp in Great Room to use a 100-watt equivalent LED, with a dimmer control. ROM = $100. About 2019.
- Replace toilet with a “comfort height” one of 17-19 inches high, as an aid to ADL #6. ROM = $1,000. About 2019.
- Install one ADA-compliant horizontal grab bar, in hallway half-bath, as an aid to ADL #5 and #6. ROM = $250. About 2019.
SECTION 6. DINING AREA (ESSENTIAL)

Identifying the Dining Area

The dining area is essential to ADL activities, and is identified in Figure 3-1 as the Dining Room, the Breakfast Nook, plus the connecting pathway between them.

The Dining Room contains a table for six, a sideboard and two china cabinets. The floor covering is plush carpet. Lighting is from a ceiling fan with four light fixtures, controlled by a dimmer light switch. The Breakfast Nook consists of a round table for four, with four wooden swivel chairs. The floor is ceramic tile. Lighting is from an overhead ceiling fan with a single light fixture, controlled by a dimmer light switch.

Potential Challenges and Vision of Changes

1. The Dining Room, the primary eating area, is fairly small, with circulation very difficult around seating adults. The client currently has no difficulty walking into the room and taking a seat at any chair location, and is not likely to have major difficulties doing so over the next ten years. But it is already a bit difficult to adjust the placement of the chairs on the plush carpeting. The room itself and its entrances are not wheelchair compatible. For this reason, should walking and getting in and out of chairs become more difficult, the room become an alternative eating area, replaced by the Breakfast Nook as the primary eating area. And, in the meantime, it is recommended that the dining table have its leaf removed, making for a table of four, thereby increasing ease of circulation and the carrying of food into the room. And when it is time to replace the carpet, use thinner padding or a non-carpet flooring.

2. The Breakfast Nook has easy access to three of the four chairs, and is well illuminated. The smooth ceramic floor makes for easy cleanups and walking, and adjusting chair placement. Should the client need some assistance in the future with ADLs, this ease of access is a true asset. To that end, consider eventually replacing the wooden swivel chairs with sturdy armchairs; this would also lower the current risk of possible coordination errors and falls around the table.

Vision of Changes for Section 6:

- Reduce size of dining room table to a four-person table, by removing the leaf, to provide better access and circulation. ROM = $0. About 2019.
- Replace wooden swivel chairs with four sturdy armchairs. ROM = $1200. About 2021.
- Replace carpet padding with thinner padding or a non-carpet flooring as an aid to walking and moving chairs. ROM = $1,500. About 2028.
SECTION 7. BEDROOM AREA (ESSENTIAL)

Identifying the Bedroom Area

The bedroom area is essential to ADL activities, and is identified in Figure 3-1 as the Master Bedroom, plus the connecting pathway to the Master Bathroom.

The Master Bedroom contains a queen size bed, two nightstands with table lamps, a side chair, two dressers and a lingerie chest. There are two clothes closets and a walk-in closet. The floor covering is plush carpet. Lighting consists of recessed lighting, controlled by a dimmer light switch. A set of French doors leads to an outside patio area. There is a functional, battery-operated smoke/CO alarm mounted on the ceiling. The windows have easily adjustable opaque fabric shades for both privacy and potential changes to sleep patterns.

Potential Challenges and Vision of Changes

1. There are no apparent challenges with ADLs in this bedroom, and none foreseen for the next ten years. The room is well illuminated, and generously proportioned. The closets all have adjustable wire shelving and clothes hanger bars, should the need ever arise to lower them for ease of use. While not currently an issue, when the carpet needs replacement, consider replacing it with thinner padding as an aid to walking and transferring from the bed.

2. There is currently no problem with getting in or out of bed. But when the time comes to replace the bed, consider the purchase of one with moving head and foot sections as a future insurance item.

Vision of Changes for Section 7:

- Replace carpet padding with thinner padding as an aid to walking. ROM = $1,700. About 2028.
SECTION 8. BATHROOM AREA (ESSENTIAL)

Identifying the Bathroom Area

The bathroom area is essential to ADL activities, and is identified in Figure 3-1 as the Master Bath, consisting of a counter area with two sinks for grooming and mouth care, a generous walk-in shower, and a separate toilet room with a corner sink. This master bathroom is immediately adjacent to the master bedroom. The toilet room and bathroom entry doors are both pocket doors.

The Master Bathroom has excellent lighting. The toilet room has an overhead night light, should nighttime visits be required. The flooring is marble tile. The walk-in shower has only a two-inch threshold, a height-adjustable shower head/wand, and built-in corner seat. There are currently no installed grab bars, although there were additional wall studs installed behind the tiled walls of the shower, and adjacent to the toilet, during construction in 2003, should the need arise. The doorway's width to the bathroom conforms to ADA guidelines. However, it should be noted that this bathroom is not adaptable as presently constructed to be wheelchair accessible, per ADA guidelines, as there is inadequate clearance in the shower and around the toilet to accommodate wheelchairs.

Potential Challenges and Vision of Changes

1. There are currently no challenges with ADLs in this bathroom.
2. Should the opportunity arise to replace the toilet, it is recommended that it be with a “comfort height” of 17-19 inches, measured from the finished floor to the top of the seat. This will aid with getting up and down from the toilet, frequently mentioned as a challenge as one ages. As a cost control measure, consider combining this project with the toilet replacement project of Section 5.
3. Even without the current physical need for use of grab bars in the shower and toilet area, it is recommended that ADA-compliant horizontal grab bars be installed in the near future for use as a fall-prevention measure. As a cost-control measure, consider combining this project with the grab bar project of Section 5. Select low-maintenance bars of a finish in keeping with the surrounding fixtures.

Vision of Changes for Section 8:

- Replace toilet with a “comfort height” one of 17-19 inches high, as an aid to ADL #6. ROM = $1,000. About 2019.
- Install one ADA-compliant horizontal grab bar each, in shower and toilet areas, as an aid to ADLs #1, #5 and #6. ROM = $500. About 2020.
SECTION 9. KITCHEN AREA

Identifying the Kitchen Area

The kitchen area is important to IADL activities, and is identified in Figure 3-1 as the Kitchen. Figure 4-1 identifies this area as closely associated with IADL activities #2, #3, #4, #5 and #9. The kitchen area consists of a pantry, food preparation surfaces, a double sink with spray wand and garbage disposal, dishwasher, refrigerator with ice maker, electric cook top with down draft venting, oven, microwave and utensil storage. The kitchen is on the main pathway between the laundry room/garage areas and the rest of the home.

The Kitchen has excellent lighting, both overhead and task. The flooring is of ceramic tile. Countertops are all at the standard 36 inches above the finished floor. One portion of the kitchen area also contains the home's typical “command center”, with wall phone, calendar, bulletin board, notepapers, writing surface table, etc.

Potential Challenges and Vision of Changes

1. There are currently no challenges with IADLs in the kitchen area.
2. There are no trip hazards in the kitchen area. There is a non-slip anti-fatigue floor mat in front of the sink. This mat should remain as an aid to IADLs #2 and #5.
3. The refrigerator is a double-door with a pullout lower freezer drawer. This works very well for the client, and should remain for now. Should the client's physical condition require a walker or wheelchair in the future, the ADA guideline calls for a combination refrigerator and freezer with at least half of the freezer space 54 inches above the finished floor.
4. The stovetop is electric, with the controls all located so as to not require reaching across burners, and the oven controls are on the front panel. This is in keeping with ADA guidance.
5. The cabinets are correctly used with seldom-used items up high and frequently used items down low. A step stool with safety handle is used for the upper shelves.
6. If future plans call for an outside party or resident attendant to assist with the IADLs in the kitchen area, this area is already quite suitable for that.

Vision of Changes for Section 9:
- No changes envisioned for the kitchen area.
SECTION 10. LAUNDRY AREA

Identifying the Laundry Area

The laundry area is important to IADL activities, and is identified in Figure 3-1 as the Laundry. Figure 4-1 identifies this area as closely associated with IADL activity #6. The laundry area consists of a top load washer and a front load dryer, a supply shelf above/behind the machines, and large hooks for clothes hangers. The laundry room also contains the HVAC and natural gas water heater for the original part of the house. The laundry room is on the main pathway between the garage and the kitchen, and from thence to the rest of the home.

The Laundry has excellent overhead lighting. The flooring is of ceramic tile. Bleach, cleansers and various polishes are stored in this room. A functional combination smoke/CO alarm is mounted on the ceiling with a ten-year battery.

Potential Challenges and Vision of Changes

1. There are currently no challenges with IADLs in the laundry area. The client currently has no difficulty using the washer or dryer. When it is time to replace the laundry machines, consider ones that are front opening and on pedestals for ease of access and operation.

2. There is currently no challenge with reaching the lowest shelf of the open supply shelves located above the laundry machines, where cleaning supplies are kept. However, the upper shelves are used not infrequently, and accessed by use of a utility stepladder. This is considered a hazardous operation, to carry things up and down on a stepladder, while reaching out to the shelves, partly standing on the laundry machines. The laundry room is quite compact, so it is recommended that, for items that cannot be excessed, they be relocated to the garage, after the garage is first decluttered. It is also recommended that a transition be made to the use of detergent “pods” versus large detergent containers, for ease of use.

3. The two doors of the laundry area conflict with one another. Deconflicting these doors is discussed in Section 12.

Vision of Changes for Section 10:
- Replace washer and dryer with front-loading machines, mounted on platforms, when the time comes, for ease of access. Install new and dispose of old. ROM = $2500. About 2022.
SECTION 11. HOME OFFICE AND ACTIVITY AREAS

Identifying the Home Office and Activity Areas

The home office and activity areas are important to ADL, IADL and PDQA activities, and are identified in Figure 3-1 as being in the Family Room, plus the pathway to the Great Room. Figure 4-1 identifies this area as closely associated with ADL #6, IADL #1 and #8, and PDQA #6 and #8. This area consists of a computer workstation outfitted with all the accoutrements of a home office, including executive chair, phone, filing drawers, office supplies and task lighting. This Family Room also contains a library in freestanding bookcases, an electric organ, a sitting area (couch, coffee table, end table, side chair), and a reading area (overstuffed chair, ottoman, and small side table).

The Family Room has no overhead lighting, but uses only task lamps. There is one for the home office, one for the reading chair, and one for the organ. Flooring is of plush carpet.

Potential Challenges and Vision of Changes

1. There are currently no challenges with IADLs or PDQAs in this area. The home office reading spaces work adequately for the client, but their ergonomics could be improved, which would help the client avoid mishaps over the next ten years in her home.
2. For the room in general, position more generously the furniture to provide better circulation and more knee room when sitting. Ridding the room of numerous storage containers of magazines could facilitate this.
3. The home office area is not adequately illuminated, despite a task lamp and a small under-the-shelf light. Additionally, the nearby telephone is out of reach from the chair position and not in an illuminated location. Recommend repositioning the phone to be near the computer and chair, and install new and brighter task lighting for the desk’s working surface areas.
4. There is no bench or chair for the electric organ. A bench would assist with PDQA #3 and avoid having to periodically carry a chair there.

Vision of Changes for Section 11:

- Invest in a bench for use with the organ. ROM = $400. About 2019.
- Position more generously the furniture in the Family Room. ROM = $0. About 2019.
SECTION 12. CAR AREA

Identifying the Car Area

The car area is identified in Figure 3-1 as being the 2-Car Garage, plus the asphalt driveway. For the sake of completeness, this area is also defined as including the pathway(s) from where the car is parked into the living areas of the home. For this home, that would include the pathway through the laundry room into the kitchen, as well as the pathway from the driveway, through the front door, and into the front hallway.

Figure 4-1 identifies this area as closely associated with IADLs #1 and #7, and PDQA #5. Being able to drive to go shopping, to church and the doctor, and to visit friends and family is extremely important to the client.

Potential Challenges and Vision of Changes

1. There are currently no challenges with IADLs or PDQAs in this area. But, as is the purpose of this STAY Plan, there are recommendations for over the next ten years that would help mitigate potential future challenges. The first recommendation is to work to declutter the garage.

2. From the vision of STAY Element Two, improve the ability of the garage to serve as an all-weather access to the home from the car, and vice versa. Park the vehicle on the right-hand side, to permit an unencumbered path by the driver to the inside of the house. Better illuminate the path by linking the operation of the garage’s main overhead lighting fixtures to that of the garage door opener.

3. Also from the vision of STAY Element Two, deconflict the two doors leading from the garage to the kitchen. As can be ascertained by the pathway shown in Figure 4-1, this path is too narrow for a wheelchair and has no room for a wheelchair to maneuver the sharp 90-degree turn, but short of the need for a wheelchair, this path is a vital component of an all-weather access from the car. The two doors strike one another inside the laundry room when in use. Having the door from the garage swing in from the other side of the doorway could solve this. The door itself seriously needs replacing, too. By the client’s county building code, this door must have a one-hour fire-resistance and have an approved self-closing device.
4. And yet again from the vision of STAY Element Two, improve security and manual dexterity operations at the front door. Consider installing a portico for all-weather operation of the front door and for the sheltered placement of an expected increase in direct delivery of packages. (A more expensive alternative would be to install a covered front porch instead of a portico, but that would accomplish the same purpose.) When replacing the front door, consider a keyless feature (available as a wireless key fob) and no storm door. Install a wireless home closed-circuit video and announcing system at the front door, interconnected to motion sensors and lighting; connection is to a tablet or cell phone. This vision would also serve first responders well. Note that wireless home security systems come with a nominal monthly service fee.

Figure 12-1  3-D rendering of a representative portico at the front door of the client’s house.

Vision of Changes for Section 12:

- Link operation of garage overhead lighting with that of the garage door opener, to improve illumination around car and path from car to inside of house. ROM = $150. About 2020.
- Replace door from garage into laundry room, and have it swing inside from other side of doorway. 1-hour rated door with self-closure. Renovate doorframe. ROM = $2,500. About 2020.
- Construct portico at front door. ROM = $19,000. About 2025.
- Replace front door, with keyless door lock. ROM = $3,500. About 2027.
- Install video surveillance and announcing system at front door. ROM = $1,700. About 2027.
SECTION 13. YARD AND GARDEN AREAS

Identifying the Yard and Garden Areas

The yard and garden areas are partially identified in Figure 3-1 as “to Patio and Pool”, but also yard and gardens on all four sides of the house. Figure 4-1 identifies the areas as being the three PDQA #9 locations, plus the rest of the outside property, up to the property line. The yard for this house includes two patios, a 20x40 foot in-ground pool, and a side utility area that contains garbage and recycling cans. There are a number of large potted plants that are brought inside the hot tub room for the winter.

A hot tub is normally outdoors and not a part of a home’s “essential spaces”. For this reason, the hot tub room is considered part of the yard and garden areas.

Potential Challenges and Vision of Changes

1. There are currently no challenges with ADLs or PDQAs in these areas. But, as is the purpose of this STAY Plan, there are recommendations for over the next ten years that would help mitigate potential future challenges.
2. From the vision of STAY Element Two, begin downsizing the number of large potted plants that need to be brought into the hot tub room each winter. This is a physically demanding task and a potential cause of bodily injury.
3. From the vision of STAY Element Three, when the need arises, replace the current seven-seat ThermoSpas hot tub with a smaller size, with an electric motor-operated cover. Order the accessory of their outside access steps, shown below, to facilitate a safer entry. This will help ensure the continuation of PDQA #1 for as long as possible. It is noted that the current tub dates to about 2005.

Figure 13-1 Outside access steps for hot tub. (from ThermoSpas website)
4. The maintenance of the yard and pool are physically demanding tasks, the cost to outsource will need to be factored into the decision to remain in the home. The client currently enjoys the pool and yard, and its maintenance is a good source of healthy exercise for the client. Due to the size of the yard, which is a lot for one person, it is recommended that the yard maintenance be outsourced to a reliable company starting next year. Outsourcing of the pool maintenance is recommended within about 5 years.

**Figure 13-2 3D rendering of smaller hot tub in hot tub room.**

**Vision of Changes for Section 13:**
- Downsize number of large potted plants that would need to be brought indoors for the winter. ROM = $0. About 2019.
- Replace hot tub with smaller unit (ThermoSpas Atlantis model), with motorized cover and optional side steps. ROM = $10,000 About 2023.
- Outsource pool and hot tub maintenance, to include chemicals. ROM = $2,500 per annum. About 2024.
SECTION 14. BUDGETING AND IMPLEMENTATION

As identified throughout this STAY Plan, a variety of one-time investments in home alterations, improvements and furnishings are recommended for accomplishment over the next ten years in order to assure a safe and continued residence in the home with a high quality-of-life. These would be in addition to expected routine major maintenance and repair expenses for the home. For budgetary and decision-making purposes, Table 14-1 provides a thirty-year overview of these estimated homeowner expenses. Detailed ten-year breakdowns of one-time investments by STAY Plan section (Table 14-2) and by year needed (Table 14-3) are provided as an implementing roadmap and for additional decision-making insights.

Table 14-1 Thirty-Year Estimated Homeowner Expenses (in 2018 dollars).
Estimated costs for utilities, taxes, insurance and outside help are not included.

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Table 14-2  Ten-Year Implementation Roadmap for STAY Plan Projects, by STAY Plan Section (in 2018 dollars). The goal is to accomplish all recommended one-time investments over the next ten years, to more assuredly remain in the home for ten-plus years.

<table>
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<th>STAY Plan Section</th>
<th>Description</th>
<th>Year Needed</th>
<th>ROM $</th>
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<td>5. Living</td>
<td>Rubber backed doormat for outside door</td>
<td>2019</td>
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<tr>
<td></td>
<td>Upgrade side-table reading lamp</td>
<td>2019</td>
<td>100</td>
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<td></td>
<td>“Comfort Height” toilet in half-bath</td>
<td>2019</td>
<td>1,000</td>
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<td></td>
<td>ADA-compliant grab bar in half-bath</td>
<td>2019</td>
<td>250</td>
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<tr>
<td></td>
<td>Upgrade short four-step stairway</td>
<td>2021</td>
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<td></td>
<td>Upgrade primary chair in Great Room</td>
<td>2021</td>
<td>750</td>
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<tr>
<td></td>
<td>Widen main hallway doorway to 32 inches</td>
<td>2028</td>
<td>2,500</td>
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<td>6. Dining</td>
<td>Remove leaf of dining table</td>
<td>2019</td>
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<td></td>
<td>Replace wooden swivel chairs</td>
<td>2021</td>
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<td>Replace carpet, with thinner padding</td>
<td>2028</td>
<td>1,500</td>
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<td>7. Bedroom</td>
<td>Replace carpet, with thinner padding</td>
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<td>8. Bathroom</td>
<td>“Comfort Height” toilet in master bathroom</td>
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<td></td>
<td>Grab bar in shower and toilet rooms</td>
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<td>9. Kitchen</td>
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<td>10. Laundry</td>
<td>Front load washer and dryer, on platforms</td>
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<tr>
<td>11. Office/Activities</td>
<td>Improve ergonomics &amp; lighting of home office</td>
<td>2019</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>Purchase of organ bench</td>
<td>2019</td>
<td>400</td>
</tr>
<tr>
<td></td>
<td>Reposition furniture in family room</td>
<td>2019</td>
<td>-</td>
</tr>
<tr>
<td>12. Car</td>
<td>Upgrade garage overhead lighting controls</td>
<td>2020</td>
<td>150</td>
</tr>
<tr>
<td></td>
<td>Replace door from garage to laundry room</td>
<td>2020</td>
<td>2,500</td>
</tr>
<tr>
<td></td>
<td>Construct portico at front door</td>
<td>2025</td>
<td>19,000</td>
</tr>
<tr>
<td></td>
<td>Replace front door, with keyless door lock</td>
<td>2027</td>
<td>3,500</td>
</tr>
<tr>
<td></td>
<td>Front door video surveillance system</td>
<td>2027</td>
<td>1,700</td>
</tr>
<tr>
<td>13. Yard/Garden</td>
<td>Downsize number of large potted plants</td>
<td>2019</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Replace hot tub with smaller unit</td>
<td>2023</td>
<td>10,000</td>
</tr>
<tr>
<td></td>
<td>Choose yard and garden maint. contractor</td>
<td>2020</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Choose pool and hot tub maint. contractor</td>
<td>2024</td>
<td>-</td>
</tr>
</tbody>
</table>

**Total**  51,900

*Note:* Data does not include cost of new maintenance items of yard maintenance contract to start in 2020 for about $3,500 per annum, or pool maintenance contract to start in 2024 for about $2,500 per annum, or wireless security contract to start in 2027 for about $500 per annum.
Table 14-3 Ten-Year Implementation Roadmap for STAY Plan Projects, by one-time investments over the next ten years, to more assuredly remain in the home for ten-plus years.

<table>
<thead>
<tr>
<th>Ten-Year Implementation Roadmap for STAY Plan Projects (2019-2028)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STAY Section</strong></td>
</tr>
<tr>
<td>5. Living</td>
</tr>
<tr>
<td>5. Living</td>
</tr>
<tr>
<td>5. Living</td>
</tr>
<tr>
<td>5. Living</td>
</tr>
<tr>
<td>6. Dining</td>
</tr>
<tr>
<td>8. Bathroom</td>
</tr>
<tr>
<td>11. Office/Activities</td>
</tr>
<tr>
<td>11. Office/Activities</td>
</tr>
<tr>
<td>13. Yard/Garden</td>
</tr>
<tr>
<td>8. Bathroom</td>
</tr>
<tr>
<td>12. Car</td>
</tr>
<tr>
<td>12. Car</td>
</tr>
<tr>
<td>13. Yard/Garden</td>
</tr>
<tr>
<td>5. Living</td>
</tr>
<tr>
<td>5. Living</td>
</tr>
<tr>
<td>6. Dining</td>
</tr>
<tr>
<td>10. Laundry</td>
</tr>
<tr>
<td>13. Yard/Garden</td>
</tr>
<tr>
<td>13. Yard/Garden</td>
</tr>
<tr>
<td>12. Car</td>
</tr>
<tr>
<td>12. Car</td>
</tr>
<tr>
<td>12. Car</td>
</tr>
<tr>
<td>5. Living</td>
</tr>
<tr>
<td>6. Dining</td>
</tr>
<tr>
<td>7. Bedroom</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

Note: Data does not include cost of new maintenance items of yard maintenance contract to start in 2020 for about $3,500 per annum, or pool maintenance contract to start in 2024 for about $2,500 per annum, or wireless security contract to start in 2027 for about $500 per annum.
## APPENDIX A

### Acronyms and Abbreviations

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>AARP ®</td>
<td>American Association of Retired Persons</td>
</tr>
<tr>
<td>ADA</td>
<td>Americans with Disabilities Act</td>
</tr>
<tr>
<td>ADL</td>
<td>Activities of Daily Living</td>
</tr>
<tr>
<td>CSA ®</td>
<td>Certified Senior Advisor</td>
</tr>
<tr>
<td>CY</td>
<td>Calendar Year</td>
</tr>
<tr>
<td>HIPAA</td>
<td>Health Insurance Portability and Accountability Act, 1996</td>
</tr>
<tr>
<td>HVAC</td>
<td>Heating, Ventilation and Air Conditioning</td>
</tr>
<tr>
<td>IADL</td>
<td>Instrumental Activities of Daily Living</td>
</tr>
<tr>
<td>PDQA</td>
<td>Personality-Driven QOL Activities</td>
</tr>
<tr>
<td>QOL</td>
<td>Quality-of-Life</td>
</tr>
<tr>
<td>ROM</td>
<td>Rough Order of Magnitude (cost estimate)</td>
</tr>
<tr>
<td>SF</td>
<td>Square Feet</td>
</tr>
<tr>
<td>STAY ™</td>
<td>A written plan associated with “stay at home”</td>
</tr>
</tbody>
</table>
The assessors of this STAY Plan rely upon their professional knowledge of general and statistical human health parameters, coupled with their experience in maintaining and modifying residential homes. Shown below is a partial listing of technical references and guidelines used in STAY planning:

<table>
<thead>
<tr>
<th>Ref. #</th>
<th>Title/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>a.</td>
<td>Americans with Disabilities Act (ADA) Standards, 2010</td>
</tr>
<tr>
<td>b.</td>
<td>Guidance on the 2010 ADA Standards for Accessible Design, Department of Justice, 15 September 2010</td>
</tr>
<tr>
<td>c.</td>
<td>2010 ADA Standards for Accessible Design, Department of Justice, 15 September 2010</td>
</tr>
<tr>
<td>d.</td>
<td>Society of Certified Senior Advisors website, <a href="https://www.csa.us">https://www.csa.us</a></td>
</tr>
<tr>
<td>e.</td>
<td>Older Adult Falls, U.S. Centers for Disease Control and Prevention, 2014</td>
</tr>
<tr>
<td>f.</td>
<td>AARP website, <a href="http://www.aarp.org">www.aarp.org</a></td>
</tr>
<tr>
<td>g.</td>
<td>Health in Aging website, <a href="http://www.healthinaging.org">www.healthinaging.org</a></td>
</tr>
<tr>
<td>i.</td>
<td>University of Southern California, School of Gerontology, <a href="https://homemods.org">https://homemods.org</a></td>
</tr>
<tr>
<td>j.</td>
<td>Health Statistics for U.S. Adults: National Health Interview, U.S. Centers for Disease Control and Prevention, 2004</td>
</tr>
<tr>
<td>k.</td>
<td>Older Americans with a Disability 2008-2012, U.S. Census Bureau</td>
</tr>
<tr>
<td>l.</td>
<td>ADL Survey, U.S. Department of Health and Human Services, 1990</td>
</tr>
</tbody>
</table>
The medical community considers ADLs as those daily self-care activities and functions that are essential to a person’s Quality of Life. Disease, debilitating injuries, or results from aging could lead to difficulties performing ADLs. Bathing is commonly reported to be first ADL for an aging person to experience as a challenge. The STAY Plan considers the general physical health needs of the client, and assesses the ability of the client to perform all ADLs in the applicable and appropriate portions of the home.

<table>
<thead>
<tr>
<th>ADL</th>
<th>Additional Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Bathing</td>
<td>The ability to wash one’s body and hair, in a bathtub or shower, by oneself</td>
</tr>
<tr>
<td>2. Dressing</td>
<td>The ability to make appropriate clothing decisions and physically dress, by oneself</td>
</tr>
<tr>
<td>3. Grooming</td>
<td>The ability to shave a beard, comb and fix a hairstyle, and trim fingernails and toenails, by oneself</td>
</tr>
<tr>
<td>4. Mouth Care</td>
<td>The ability to brush one’s teeth, or to care for the cleaning and placing of one’s dentures, by oneself</td>
</tr>
<tr>
<td>5. Toileting</td>
<td>The ability, both mentally and physically, to use a restroom, by oneself</td>
</tr>
<tr>
<td>6. Transferring</td>
<td>The ability to move from seated to standing positions, and to get in and out of bed, by oneself</td>
</tr>
<tr>
<td>bed/chair</td>
<td></td>
</tr>
<tr>
<td>7. Walking</td>
<td>The ability to transport oneself horizontally, with or without the assistance of a cane or walker</td>
</tr>
<tr>
<td>8. Climbing stairs</td>
<td>The ability to transport oneself up and down stairs, with or without the assistance of a cane</td>
</tr>
<tr>
<td>9. Eating</td>
<td>The ability to feed oneself, though not necessarily to prepare the food</td>
</tr>
</tbody>
</table>
APPENDIX D

Instrumental Activities of Daily Living (IADLs)

Professionals working with older adults consider IADLs as key tasks and activities that are instrumental for functioning as an independent adult. IADLs contribute greatly to one’s overall wholesome Quality of Life (QOL), yet are not absolutely essential for daily living, as are ADLs. Disease, debilitating injuries, or results from aging could lead to difficulties performing IADLs. The STAY Plan incorporates measures to help ensure that the client can continue to perform IADLs in the applicable and appropriate portions of the home.

<table>
<thead>
<tr>
<th>IADL</th>
<th>Additional Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Shopping</td>
<td>The ability to make appropriate food and clothing purchase decisions, by oneself</td>
</tr>
<tr>
<td>2. Cooking</td>
<td>The ability to plan, prepare, and storage meals, and to safely use kitchen equipment, by oneself</td>
</tr>
<tr>
<td>3. Managing medications</td>
<td>The ability to take accurate dosages at the appropriate times, managing re-fills and avoiding medicinal conflicts, by oneself</td>
</tr>
<tr>
<td>4. Using phone and looking up numbers</td>
<td>The ability to use devices such as a regular phone, mobile phone, email or the Internet, by oneself</td>
</tr>
<tr>
<td>5. Doing Housework</td>
<td>The ability to clean dishes and maintain a generally hygienic place of residence, by oneself</td>
</tr>
<tr>
<td>6. Doing laundry</td>
<td>The ability to wash and fold laundry, collect it and store it, and to change sheets and towels to maintain a hygienic place of residence, by oneself</td>
</tr>
<tr>
<td>7. Driving or using public transport</td>
<td>The ability to either drive oneself, arrange rides, or to use public transportation, by oneself</td>
</tr>
<tr>
<td>8. Managing finances</td>
<td>The ability to operate within a budget, write checks, pay bills with cash and credit cards, and avoid financial scams, by oneself</td>
</tr>
<tr>
<td>9. Manual Dexterity</td>
<td>The ability to open cans and lids of food and medicine containers and boxes, by oneself. The ability to turn a key in a door.</td>
</tr>
</tbody>
</table>
APPENDIX E

Personality-Driven QOL Activities (PDQAs)

Home consulting engineers, working with older adults, inventory and assess the unique PDQAs of their clients. These activities are unique to each person, usually consist of activities other than ADLs and IADLs, and greatly contribute to an individual’s joy of living and overall QOL. As an example, “cooking” is IADL #2, but if it is claimed by the person as providing true joy, it is also listed here as a PDQA. To the extent feasible, practicable, and having a linkage to the home, the professional therefore includes maintaining these activities in the preparation of STAY Plans. This Appendix provides an inventory of the PDQAs communicated as the nine most important to this client.

<table>
<thead>
<tr>
<th>PDQA</th>
<th>Additional Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Hot tub</td>
<td>The ability to get in and out of a hot tub, by oneself</td>
</tr>
<tr>
<td>2. Hosting</td>
<td>The ability to plan, prepare, and arrange for dinner events for 4-20 persons in the home, by oneself</td>
</tr>
<tr>
<td>3. Music</td>
<td>The ability to play and listen to music, and sing along at home and at church, by oneself</td>
</tr>
<tr>
<td>4. TV</td>
<td>The ability to use a modern television or electronic devices for entertainment, by oneself</td>
</tr>
<tr>
<td>5. Driving</td>
<td>The ability to safely drive, park and access a motor vehicle from one’s residence, by oneself</td>
</tr>
<tr>
<td>6. Email</td>
<td>The ability to check, read and create emails, and use the Internet, by oneself</td>
</tr>
<tr>
<td>7. Puzzles</td>
<td>The ability to work jigsaw puzzles, with others and by oneself</td>
</tr>
<tr>
<td>8. Reading</td>
<td>The ability to comfortably sit and clearly read written matter, either hard or soft copy, by oneself</td>
</tr>
<tr>
<td>9. Gardening</td>
<td>The ability to plant, tend and water flowers outside of the home, by oneself</td>
</tr>
</tbody>
</table>
## APPENDIX F

### Personal Interview Record

**Background / POQs**

1. **About the client**

2. **Current Activities**

3. **Typical Day/Week**
   - Tends to be a night owl and a late sleeper. A weekly trip to grocery store, post office, and gas station. Visits nearby mother and sister on weekends. Trips to church twice a week. Does laundry and house cleaning. Checking emails, some on-line shopping. Drives to doctor about monthly.

4. **Special Likes**
   - Enjoys gardening, eating out, and traveling. Enjoys late night TV and listening to music. Enjoys sewing of all kinds, reading and jigsaw puzzles (especially in evenings). Enjoys cooking and baking. Occasional glass of evening wine.

**Preferences**

5a. **Why feel you want to stay in home?**
   - Have personalized it for 31 years; established routines; with house paid for, seems financially sensible.

5b. **Options available, other than staying in home?**
   - Retirement community of Collington, living with daughter and her family.

### Assessment of ADLs

<table>
<thead>
<tr>
<th>ADL</th>
<th>Activity</th>
<th>Notes</th>
<th>Assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADL 1</td>
<td>Bathing</td>
<td>The ability to wash one's body and hair, in a bathtub or shower, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>ADL 2</td>
<td>Dressing</td>
<td>The ability to make appropriate clothing decisions and physically dress, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>ADL 3</td>
<td>Grooming</td>
<td>The ability to shave a beard, comb and fix a hairstyle, and trim fingernails and toenails, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>ADL 4</td>
<td>Mouth Care</td>
<td>The ability to brush one's teeth, or to care for the cleaning and placing of one's dentures, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>ADL 5</td>
<td>Toileting</td>
<td>The ability, both mentally and physically, to use a restroom, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>ADL 6</td>
<td>Transferring bed/Chair</td>
<td>The ability to move from seated to standing positions, and to get in and out of bed, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>ADL 7</td>
<td>Walking</td>
<td>The ability to transport oneself horizontally, with or without the assistance of a cane or walker.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>ADL 8</td>
<td>Climbing stairs</td>
<td>The ability to transport oneself up and down stairs, with or without the assistance of a cane.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>ADL 9</td>
<td>Eating</td>
<td>The ability to feed oneself, though not necessarily to prepare the food.</td>
<td>Requires No Assistance</td>
</tr>
</tbody>
</table>

### Assessment of IADLs

<table>
<thead>
<tr>
<th>IADL</th>
<th>Activity</th>
<th>Notes</th>
<th>Assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>IADL 1</td>
<td>Shopping</td>
<td>The ability to make appropriate food and clothing purchase decisions, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>IADL 2</td>
<td>Cooking</td>
<td>The ability to plan, prepare, and storage meals, and to safely use kitchen equipment, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
</tbody>
</table>

**Situational Considerations for OIs:**

<table>
<thead>
<tr>
<th>Reba Pfeiffer</th>
<th>March 27, 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interview Date</td>
<td></td>
</tr>
</tbody>
</table>

---

Copyright 2018 by HomeSpan
<table>
<thead>
<tr>
<th>IADL 3</th>
<th>Managing medications</th>
<th>The ability to take accurate dosages at the appropriate times, managing re-fill and avoiding medicinal conflicts, by oneself.</th>
<th>Requires No Assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>IADL 4</td>
<td>Using phone and looking up numbers</td>
<td>The ability to use devices such as a regular phone, mobile phone, email or the internet, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>IADL 5</td>
<td>Doing housework</td>
<td>The ability to clean dishes and maintain a generally hygienic place of residence, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>IADL 6</td>
<td>Doing laundry</td>
<td>The ability to wash and fold laundry, collect it, transport it and store it, and to change sheets and towels to maintain a hygienic place of residence, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>IADL 7</td>
<td>Driving or using public transport</td>
<td>The ability to either drive oneself, arrange rides, or to use public transportation, by oneself. Has own car, garaged.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>IADL 8</td>
<td>Managing finances</td>
<td>The ability to operate within a budget, write checks, pay bills with cash and credit cards, and avoid financial scams, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>IADL 9</td>
<td>Manual dexterity</td>
<td>The ability to open cans and lids of food and medicine containers and boxes, by oneself. The ability to turn a key in a door.</td>
<td>Requires No Assistance</td>
</tr>
</tbody>
</table>

**Assessment of PDQAS**

<table>
<thead>
<tr>
<th>PDQA 1</th>
<th>Hot tub</th>
<th>The ability to get in and out of a hot tub, by oneself.</th>
<th>Requires No Assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>PDQA 2</td>
<td>Hosting</td>
<td>The ability to plan, prepare, and arrange for dinner events for 6-70 persons in the home, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>PDQA 3</td>
<td>Music</td>
<td>The ability to play and listen to music, and sing along at home and at church, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>PDQA 4</td>
<td>TV</td>
<td>The ability to use a modern television or electronic devices for entertainment, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>PDQA 5</td>
<td>Driving</td>
<td>The ability to safely drive, park and access a motor vehicle from one’s residence, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>PDQA 6</td>
<td>Email</td>
<td>The ability to check, read and create emails, and use the internet, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>PDQA 7</td>
<td>Puzzles</td>
<td>The ability to work jigsaw puzzles, with others and by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>PDQA 8</td>
<td>Reading</td>
<td>The ability to comfortably sit and clearly read written matter, either hard or soft copy, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
<tr>
<td>PDQA 9</td>
<td>Gardening</td>
<td>The ability to plant, tend and water flowers outside of the home, by oneself.</td>
<td>Requires No Assistance</td>
</tr>
</tbody>
</table>

Assessment Ratings:
- Requires No Assistance
- Needs Some Assistance
- Needs Complete Assistance
- N/A
Buil

ding Inspection Report

5572 LaVista Dr., Alexandria, VA.

Insp

tection Date:
2-3-18

Prepared For:
David and Mikale Asiello

Prepared By:
ACS Home Inspections
7880 Backlick Rd., Suite 7
Springfield, Va.  22150

703.866.0243
703.866.7732 Fax

Report Number:
10292304

Inspector:
John Spinello

House Faces: North

Weather: Cold, 40’s

House Age: New

Ground Cover: Wet, Snow

House Style: Colonial

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THE HOUSE IN PERSPECTIVE

CONVENTIONS USED IN THIS REPORT

For your convenience, the following conventions have been used in this report.

**Major Concern:** a system or component which is considered significantly deficient or is unsafe. Significant deficiencies need to be corrected and, except for some safety items, are likely to involve significant expense.

**Safety Issue:** denotes a condition that is unsafe and in need of prompt attention.

**Repair:** denotes a system or component which is missing or which needs corrective action to assure proper and reliable function.

**Improve:** denotes improvements which are recommended but not required.

**Monitor:** denotes a system or component needing further investigation and/or monitoring in order to determine if repairs are necessary.

Please note that those observations listed under “Discretionary Improvements” are not essential repairs, but represent logical long term improvements.

IMPROVEMENT RECOMMENDATION HIGHLIGHTS / SUMMARY

The following is a synopsis of all issues discovered during the inspection. Please refer to the body of this report for further details on these and other recommendations. It is recommended that any repairs that are performed as a result of this report be done so only by licensed or qualified contractors or professionals.

**Floors**
- **Repair**
- **Improve**

- “Fire-stopping” is needed at the furnace flue at the basement ceiling. Sheet metal, insulation and/or drywall are acceptable materials for this repair. In its present state, the ceiling is open to the floor(s) above. This could allow faster flame spread in case of a fire.

**Attic**
- **Monitor:**
- **Repair:**

- The attic appears to be missing “hurricane” bracing, which connects trusses to the attic floor.

**Sloped Roofing**
- **Improve:**
- **Repair:**

- At least one roof “support/brace” is still in place (at the garage roof). This should be removed and the shingles repaired as needed.

**Flashings**
- **Repair:**

- The flashings are missing at the small front roof to the right of the foyer window and at the garage roof where it meets the left corner of the house.

**Exterior Walls**
- **Repair:**
- **Repair:**

- Some siding is missing between the windows at the rear upper level and should be repaired/ replaced.
- The siding needs caulking/sealing at the front corners of the house where brick meets vinyl siding.

**Trim, Fascia, Soffit**
- **Improve:**

- Trim was found in need of painting at the side of the front bay window (caulk also) and under the rear bay window. Caulk is needed around the front door and at the trim at the front bay window.

**Windows (see 7C.17)**
- **Repair:**

- A missing screen(s) was found at the front bay window, dinette and basement rear windows.
Garage
- **Repair:** The garage is showing signs of water entry at the side wall and side door.
- **Improve:** The service doors at the garage and trim need painting.
- **Repair:** The concrete is damaged where it meets the driveway.

Lot Drainage
- **Repair:** The grading should be improved to promote the flow of storm water away from the house. This can often be accomplished by the addition of top soil. The ground should slope away from the house at a rate of one inch (1") per foot (12") for at least the first ten (10) feet. At least eight (8) inches of clearance should be maintained between soil level and the bottom of exterior wall siding. Improvement is needed at the area left of the stoop. Also, the grading is largely incomplete at this time. When it is finished, care should be taken to insure that the area at the rear corner of the house will properly drain to the back yard and into the storm drain.
- **Repair:** Monitor: The grading should be improved to promote the flow of storm water away from the house. This can often be accomplished by the addition of top soil. The ground should slope away from the house at a rate of one inch (1") per foot (12") for at least the first ten (10) feet. At least eight (8) inches of clearance should be maintained between soil level and the bottom of exterior wall siding. Improvement is needed at the area left of the stoop. Also, the grading is largely incomplete at this time. When it is finished, care should be taken to insure that the area at the rear corner of the house will properly drain to the back yard and into the storm drain.

Steps
- **Repair:** The stoop is damaged/worn at the left side.

Retaining Walls (see 2C.20):
- **Repair:** The retaining wall needs concrete repair at the top of the steps.

Service / Entrance (see 5A.01)
- **Monitor:** The service has no visible ground connection. According to the builder, a UFER ground is in use (in the foundation). Have the builder show in writing that this is the case.

Outlets
- **Repair:** An outlet is plugged/blockaded at the disposal and should be replaced. Something has broken off in the outlet.

Lights
- **Monitor:** Recessed light fixtures (sometimes referred to as “pot lights”) that are installed in insulated ceilings can represent a fire hazard if they are not suitably rated for this application. A qualified, licensed electrician should be consulted to verify the safety of the system. Lights rated for installation in insulated ceilings are marked as “direct-contact-insulated-ceilings” or “DCIC” or are marked as “thermally protected.” Insulation must be pulled back from unprotected lights (master bath?) to avoid the fire risk.
- **Repair:** The light at the sunken basement storage room is inoperative. If the bulbs are not blown, the circuit should be evaluated.
- **Repair:** The loose light fixtures at the master bath and under stair closet should be secured.
- **Improve:** The dinette light is crooked.

Supply Air Ductwork
- **Repair:** No heat supply was found at the basement hallway. Is one called for on the plans??
- **Repair:** Supply air flow is poor at the basement registers (all except the bath) and at the register in the master bedroom near Dave’s closet. The duct for this register was found disconnected in the attic.
- **Improve:** Repair: The humidifier appears to be missing the bypass damper at the return ducting. Also, the duct damper at the main return duct over the furnace (the one that is hard to get to) is inoperative.
- **Monitor:** Repair: The main duct over the furnace contacts the wood joists. This may not be allowed. Have checked.

Return Air Ductwork
- **Improve:** The return duct at the hall ceiling is loose and doesn’t fit flush against the ceiling.

Central Air Conditioning (see 6H)
- **Repair:** The fins of the outdoor portion of the air conditioning system are bent/ damaged. This condition can reduce the efficiency of the system.
- **Monitor:** Improve: A plug at the condensate area of the attic A/C unit is damaged and may need to be replaced to prevent leakage.

Water Heater (see 4A.12)
- **Repair:** The thermostat at the water heater does not seem to correspond to the water temperature. Evaluation of the thermostat is needed. The tank produces 130 degrees when the setting is at the warm mark.
• **Repair:** The flame in the water heater needs adjustment to insure proper combustion. It is largely yellow.

**Supply Plumbing**
• **Improve:** Water pressure in the house is considered to be sub-standard. Pressure was tested by operating several plumbing fixtures at the same time. This may be improveable by adjustment of your pressure regulator valve (if present). Consult a plumber. The pressure drops off noticeably when multiple fixtures are operated.
• **Repair:** The supply pipe at the laundry sink lacks adequate support.

**Fixtures**
• **Repair:** The disposal wire restricts the operation of the sink faucet extension.
• **Repair:** The pedestal is missing from the sink at the half bath.
• **Improve:** A large gap was found under the sink top at the upper hall bath.
• **Monitor:** **Improve:** **Repair:** Access to the whirlpool motor is very difficult at best. This should be improved.
• **Improve:** The exterior faucets did not operate and appear to be winterized.

**Refrigerator**
• **Repair:** The refrigerator has a small dent at the top of the door and the doors do not fit evenly.
• **Monitor:** The operation of the icemaker was not verified. Check at walk thru.

**Clothes Dryer**
• **Repair:** The clothes dryer needs to be leveled out.

**Clothes Washer**
• **Monitor:** The washer should ideally have an overflow pan in case of leakage. A drain should be run to the floor drain at the basement also as required.

**Fireplaces**
• **Possible Repair:** The wood mantle gets very hot when the fireplace has been running for a while. Consult the manufacturer.
• **Repair:** Screws and some cracks are visible around the mantle.

**Wall / Ceiling Finishes**
• **Repair:** **Improve:** Patching of drywall is needed at: the dining room outlet near the post, the basement office register and electric outlet, the electric panel, the wall and ceiling at the under stair closet in the basement (access is needed to the cleanout pipe also), the basement bath ceiling, the return duct at the basement, right of the fridge, at the high ceiling over the bottom of the secondary stairs (nail pops), at the laundry closet, at the half bath light, to the right of the middle level return duct, below the bay window (living room), at the doorway between the dining room and kitchen, at the front corner bedroom smoke alarm and ceiling fan plate, behind the upper hall toilet and at the wall below the shower, at the switch at the upper hall bath, at the ceiling of the Michelle closet, at the side wall of the master bedroom and at the crack near the mirror at the master bath.
• **Repair:** Walls, etc. were found to be crooked/out of level at: the basement toilet area, at the basement french door, at the dining room post area, at the rear rec room window and at the ceiling over the fireplace (this has been patched and still looks the same). The walls at the master bath sinks are also crooked.
• **Improve:** Paint is needed at the living/dining room wall where writing is still visible.

**Floors**
• **Improve:** Floor squeaks were found at: the fridge area, along the stairs in the family room, at the upper hall at the linen closet and bedroom, at the master bath door, at the front corner bedroom at the side wall, and at the rear corner bedroom at the closet.
• **Repair:** Floor slopes are apparent at the basement bath at the toilet.
• **Improve:** Shoe molding is unfinished at the basement bath.
• **Improve:** The wood step at the top of the basement stairs is scratched.
• **Repair:** A large gap was found at the library/study floor.
• **Improve:** Carpet needs improving at the basement steps.
• **Repair:** Some wood flooring is missing at the half bath.
• **Improve:** The trim is incomplete at the laundry closet.
• **Repair:** Wood flooring was found sunken near the kitchen island, scratched at the dinette and near the fridge and living room, and gaps were found at the living room.
• **Improve:** The master bath floor is missing some grout.
• **Improve:** A large gap was found in the trim at the master bedroom floor.

**Windows (see 7C.17)**
• **Repair:** The window at the family room right of the fireplace has no spring at its right side. The window next to it has a slanted sill and the window doesn’t close or latch.
• **Repair:** Windows at the basement rear are missing locks or have locks that don’t latch.

**Doors**
• **Improve:** Deadbolt locks at the front door do not fully latch into the frame, and therefore do not properly lock. Drilling further into the frame is needed.
• **Repair: Improve:** Doors were found to fit poorly or rub on the frame when closing at: master bath, library (doors uneven also), the deck door, the half bath, the front door, and doors close on their own and need repair at the : basement bath and middle rear bedroom (wall is dinged also).
• **Improve:** Locks were found to be inoperative or need adjustment at: the master bedroom and basement exterior door.
• **Improve:** The hinge at the garage service door is missing screws.
• **Improve:** Door stoppers are needed at: the basement storage closet and half bath.

**Kitchen Counters**
• **Monitor: Repair:** The kitchen counter appears scratched at the fridge area.

**Kitchen Cabinets**
• **Repair:** Damaged/scratched kitchen cabinets should be repaired. This was visible at: the island face, at the oven and corner area, at the cabinet over the dishwasher, right of the fridge, etc.
• **Improve:** Shelf supports and rubber bumpers are needed at some areas.
• **Improve:** The holes under the sink should be filled.
• **Repair:** A drawer at the island is inoperative.
• **Repair:** The rear of the island should be covered by a single panel and the corner trim is also missing.

**Stairways**
• **Repair: Monitor:** Stair railings at several areas appear to be slanted/out of level.
• **Improve:** The railing post halfway up the main stairs has a large gap at its bottom and the drywall needs improving here also.

**THE SCOPE OF THE INSPECTION**

All components designated for inspection in the ASHI® Standards of Practice are inspected, except as may be noted in the “Limitations of Inspection” sections within this report.

It is the goal of the inspection to put a home buyer in a better position to make a buying decision. Not all improvements will be identified during this inspection. Unexpected repairs should still be anticipated. The inspection should not be considered a guarantee or warranty of any kind.

Please refer to the pre-inspection contract for a full explanation of the scope of the inspection.
Structure

DESCRIPTION OF STRUCTURE (SEE 1A)

Foundation:
• Poured Concrete
• Basement Configuration
• Inspection by Direct Access
• 100% Of Foundation Was Not Visible at Interior
Columns:
• Steel
Floor Structure:
• Concrete
Wall Structure:
• Wood Frame, Brick Veneer
Ceiling Structure:
• Joist
Roof Structure:
• Trusses
• Waferboard Sheathing
Attic Inspection:
• Access by Scuttle
• Located in: Upper level hall
• Inspected from in attic

STRUCTURE OBSERVATIONS

Positive Attributes
The construction of the home is good quality. The materials and workmanship, where visible, are good.

RECOMMENDATIONS / OBSERVATIONS

Floors
• Repair: Improve: “Fire-stopping” is needed at the furnace flue at the basement ceiling. Sheet metal, insulation and/or drywall are acceptable materials for this repair. In its present state, the ceiling is open to the floor(s) above. This could allow faster flame spread in case of a fire.

Attic
• Monitor: Repair: The attic appears to be missing “hurricane” bracing, which connects trusses to the attic floor.

LIMITATIONS OF STRUCTURE INSPECTION

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions:
• Structural components concealed behind finished surfaces could not be inspected.
• Engineering or architectural services such as calculation of structural capacities, adequacy, or integrity are not part of a home inspection.
• Sheetrock and/or insulation limited access to interior foundation walls.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.
DESCRIPTION OF ROOFING (SEE 3A)

General Information:
- Style: Gable
- Pitch: Medium/Steep
- Number of Layers: 1
- Roof Age: New
- Valley Material: Shingle Material

Roof Covering:
- Asphalt Shingle (see 3c.01)

Roof Flashings:
- Metal

Roof Drainage System:
- Aluminum
- Downspouts discharge above grade

Chimneys/Roof Penetrations:
- Metal
- Plumbing Vents
- Roof vents/ Fans
- Viewed with Binoculars

Method of Inspection:

ROOFING OBSERVATIONS

Positive Attributes
The roof coverings are in generally good condition.

RECOMMENDATIONS / OBSERVATIONS

Sloped Roofing
• Improve: Repair: At least one roof “support/brace” is still in place (at the garage roof). This should be removed and the shingles repaired as needed.

Flashings
• Repair: The flashings are missing at the small front roof to the right of the foyer window and at the garage roof where it meets the left corner of the house.

LIMITATIONS OF ROOFING INSPECTION

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions:
• Evidence of prior leaks may be disguised by interior finishes.
• Estimates of remaining roof life are approximations only and do not preclude the possibility of leakage. Leakage can develop at any time and may depend on rain intensity, wind direction, ice build up, and other factors.
• Antennae, chimney/flue interiors which are not readily accessible are not inspected and could require repair.
• Roof inspection may be limited by access, condition, weather, or other safety concerns.
• Some roof flashings were not visible for inspection.
• Snow on the roof restricted the inspection in some areas.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.
DESCRIPTION OF EXTERIOR (SEE 2A)

Wall Covering:
- • Brick
- • Vinyl Siding
Eaves, Soffits, Facias and Trim:
- • Wood
Exterior Doors:
- • French Doors
- • Fiberglass
Window/Door Frames:
- • Vinyl-Covered
Storms and Screens:
- • Insulated Glass with Screens
Entry Driveways:
- • Asphalt
Entry Walkways and Patios:
- • Concrete
Garage Related:
- • Attached
- • 2 Car
Overhead Garage Doors:
- • Steel
Surface Drainage:
- • Level Grade
- • Graded Away From House
- • Graded Towards House
Retaining Walls:
- • Concrete

EXTERIOR OBSERVATIONS

Positive Attributes
The exterior siding that has been installed on the house is relatively low maintenance. Window frames are clad, for the most part, with a low maintenance material.

RECOMMENDATIONS / OBSERVATIONS

Exterior Walls
- • Repair: Some siding is missing between the windows at the rear upper level and should be repaired/ replaced.
- • Repair: The siding needs caulking/sealing at the front corners of the house where brick meets vinyl siding.

Trim, Fascia, Soffit
- • Improve: Trim was found in need of painting at the side of the front bay window (caulk also) and under the rear bay window. Caulk is needed around the front door and at the trim at the front bay window.

Windows (see 7C.17)
- • Repair: A missing screen(s) was found at the front bay window, dinette and basement rear windows.

Garage
- • Repair: The garage is showing signs of water entry at the side wall and side door.
- • Improve: The service doors at the garage and trim need painting.
- • Repair: The concrete is damaged where it meets the driveway.

Lot Drainage
- • Repair: Monitor: The grading should be improved to promote the flow of storm water away from the house. This can often be accomplished by the addition of top soil. The ground should slope away from the house at a rate of one inch (1") per foot (12") for at least the first ten (10) feet. At least eight (8) inches of clearance should be maintained between soil level and the bottom of exterior wall siding. Improvement is needed at the area left of the stoop. Also, the grading is largely incomplete at this time. When it is finished, care should be taken to insure that the area at the rear corner of the house will properly drain to the back yard and into the storm drain.

Steps
- • Repair: The stoop is damaged/worn at the left side.

Retaining Walls (see 2C.20):
• **Repair:** The retaining wall needs concrete repair at the top of the steps.

**Discretionary Improvements**
Adding screens to exterior exhaust vents would help to keep out birds.

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**LIMITATIONS OF EXTERIOR INSPECTION**

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions:

- The inspection does not include an assessment of geological, geotechnical, or hydrological conditions, or environmental hazards.
- Screening, shutters, awnings, or similar seasonal accessories, fences, recreational facilities, outbuildings, seawalls, breakwalls, docks, erosion control and earth stabilization measures are not inspected unless specifically agreed-upon and documented in this report.
- Storage in the garage restricted the inspection.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.
### Description of Electrical (See 5A)

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Size of Electrical Service:</td>
<td>• 120/240 Volt Main Service - Service Size: 200 Amp</td>
</tr>
<tr>
<td>Service Drop:</td>
<td>• Underground</td>
</tr>
<tr>
<td>Service Entrance Conductors:</td>
<td>• Aluminum</td>
</tr>
<tr>
<td>Service Equipment &amp; Main Disconnects:</td>
<td>• Main Service Rating 200 Amp • Breakers • Located: in Main Panel</td>
</tr>
<tr>
<td>Service Grounding:</td>
<td>• Copper • Ufer Ground ?</td>
</tr>
<tr>
<td>Service Panel &amp; Overcurrent Protection:</td>
<td>• Panel Rating: 200 Amp • Breakers • Located: In Basement Office</td>
</tr>
<tr>
<td>Distribution Wiring:</td>
<td>• Copper • Aluminum-Multi-Strand</td>
</tr>
<tr>
<td>Wiring Method:</td>
<td>• Non-Metallic Cable &quot;Romex&quot;</td>
</tr>
<tr>
<td>Ground Fault Circuit Interrupters:</td>
<td>• Bathroom(s) • Kitchen • Basement furnace room</td>
</tr>
<tr>
<td>Smoke Detectors:</td>
<td>• Present</td>
</tr>
</tbody>
</table>

### Electrical Observations

#### Positive Attributes

The size of the electrical service is sufficient for typical single family needs. The main electric panel appears in good order. No evidence of amateur workmanship was found.

Generally speaking, the electrical system is in good order. All 3-prong outlets that were tested were appropriately grounded. Ground fault circuit interrupter (GFCI) devices have been provided in some areas of the home. These devices are extremely valuable, as they offer an extra level of shock protection. All GFCI’s that were tested responded properly. (see 5A.12) Dedicated 220 volt circuits have been provided for all 220 volt appliances within the home.

#### General Comments

It is not recommended to have a fridge/freezer plugged into a GFI controlled outlet as this outlet can “trip” without warning and disconnect power to the appliance. This setup is often found in a garage. You may consider having a non-GFI dedicated circuit installed.

### Recommendations / Observations

#### Service / Entrance (see 5A.01)

- **Monitor:** The service has no visible ground connection. According to the builder, a UFER ground is in use (in the foundation). Have the builder show in writing that this is the case.

#### Outlets

- **Repair:** An outlet is plugged/block at the disposal and should be replaced. Something has broken off in the outlet.

#### Lights

- **Monitor:** Recessed light fixtures (sometimes referred to as “pot lights”) that are installed in insulated ceilings can represent a fire hazard if they are not suitably rated for this application. A qualified, licensed electrician should be consulted to verify the safety of the system. Lights rated for installation in insulated ceilings are marked as “direct-contact-insulated-ceilings” or “DCIC” or are marked as “thermally protected.” Insulation must be pulled back from unprotected lights (master bath?) to avoid the fire risk.

- **Repair:** The light at the sunken basement storage room is inoperative. If the bulbs are not blown, the circuit should be evaluated.

- **Repair:** The loose light fixtures at the master bath and under stair closet should be secured.

- **Improve:** The dinette light is crooked.
LIMITATIONS OF ELECTRICAL INSPECTION

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions:

- Electrical components concealed behind finished surfaces are not inspected.
- Only a representative sampling of outlets and light fixtures may have been tested (depending on access to interior areas).
- The inspection does not include remote control devices, alarm systems and components, low voltage wiring, systems, and components, ancillary wiring, systems, and other components which are not part of the primary electrical power distribution system.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.
DESCRIPTION OF HEATING (SEE 6A)

Energy Source: • Gas
Heating System Type: • Forced Air Furnace • Manufacturer: Comfortmaker • Serial Number: a032604477 (basement unit) • System Age: New • Main Shutoff Location: Gas Meter

Vents, Flues, Chimneys: • Metal-Multi Wall
Heat Distribution Methods: • Ductwork
Filter: • Paper (disposable) • Location(s): the basement furnace and each upper level return grille
Other Components: • Multiple Zones/Thermostats • Humidifier (see 6A.12) • Indoor Intake Ducting

HEATING OBSERVATIONS

Positive Attributes
The system has duct dampers which allow you to control air flow to the different levels of the home.

General Comments
If not already permanently installed, carbon monoxide detectors are highly recommended. Garages, fireplaces, and any fossil fuel burning appliances can produce this gas which can be deadly. An annual service contract is recommended to keep your system(s) in proper operating condition.

RECOMMENDATIONS / OBSERVATIONS

Supply Air Ductwork
• Repair: No heat supply was found at the basement hallway. Is one called for on the plans??
• Repair: Supply air flow is poor at the basement registers (all except the bath) and at the register in the master bedroom near Dave’s closet. The duct for this register was found disconnected in the attic.
• Improve: Repair: The humidifier appears to be missing the bypass damper at the return ducting. Also, the duct damper at the main return duct over the furnace (the one that is hard to get to) is inoperative.
• Monitor: Repair: The main duct over the furnace contacts the wood joists. This may not be allowed. Have checked.

Return Air Ductwork
• Improve: The return duct at the hall ceiling is loose and doesn’t fit flush against the ceiling.

LIMITATIONS OF HEATING INSPECTION

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions:
• The adequacy of heat supply or distribution balance is not inspected.
• The interior of flues or chimneys which are not readily accessible are not inspected.
• The humidifier, or dehumidifier, are not inspected.
• Solar space heating equipment/systems are not inspected.
• The furnace heat exchanger can only be partially inspected. Further evaluation by a heating company may be desired.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.
Cooling/Heat Pumps

DESCRIPTION OF COOLING / HEAT PUMPS (SEE 6H)

Energy Source:
• Electricity
• 240 Volt Power Supply

Central System Type:
• Air Cooled Central Air Conditioning
• Manufacturer: Comfortmaker
• Serial Numbers: e033539137 basement/ e034106838 attic
• Age (Basement Unit: New)
• Age (Upper Level Unit: New)

Other Components:
• Air Handler/Fan

COOLING / HEAT PUMPS OBSERVATIONS

Positive Attributes
The capacity and configuration of the system should be sufficient for the home. This is a relatively new system that should have years of useful life remaining. Regular maintenance will, of course, be necessary. The location of the return air vents is well suited to air conditioning.

General Comments
An annual service contract is recommended to keep your system(s) in proper operating condition. The fuses for the A/C units are installed in the off position at the exterior fuse boxes. These must be reversed for the units to operate.

RECOMMENDATIONS / OBSERVATIONS

Central Air Conditioning (see 6H)
• Repair: The fins of the outdoor portion of the air conditioning system are bent/damaged. This condition can reduce the efficiency of the system.
• Monitor: Improve: A plug at the condensate area of the attic A/C unit is damaged and may need to be replaced to prevent leakage.

LIMITATIONS OF COOLING / HEAT PUMPS INSPECTION

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions:
• Window mounted air conditioning units are not inspected.
• The cooling supply adequacy or distribution balance are not inspected.
• The air conditioning system(s) could not be tested as the outdoor temperature was below 60 degrees F.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.
DESCRIPTION OF INSULATION / VENTILATION (SEE 9D/9E)

**Attic Insulation:**
- R30 Fiberglass in Main Attic

**Exterior Wall Insulation:**
- Not Visible

**Basement Wall Insulation:**
- R8 insulation was found on basement walls at unfinished areas.

**Vapor Retarders:**
- Foil

**Roof Ventilation:**
- Soffit Vents
- Ridge Vents

**Exhaust Fan/vent Locations:**
- Bathroom
- Dryer
- Cooktop Down Draft

INSULATION / VENTILATION OBSERVATIONS

RECOMMENDATIONS / ENERGY SAVING SUGGESTIONS

LIMITATIONS OF INSULATION / VENTILATION INSPECTION

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions:

- Insulation/ventilation type and levels in concealed areas are not inspected. Insulation and vapor barriers are not disturbed and no destructive tests (such as cutting openings in walls to look for insulation) are performed.
- Potentially hazardous materials such as Asbestos and Urea Formaldehyde Foam Insulation (UFFI) cannot be positively identified without a detailed inspection and laboratory analysis. This is beyond the scope of the inspection.
- An analysis of indoor air quality is not part of our inspection unless explicitly contracted-for and discussed in this or a separate report.
- Any estimates of insulation R values or depths are rough average values.
- No access was gained to the wall cavities of the home.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.
DESCRIPTION OF PLUMBING (SEE 4A)

Water Supply Source: • Public Water Supply
Service Pipe To House: • Plastic
Main Water Valve Location: • Furnace Room
Interior Supply Piping: • Copper • Plastic
Waste System: • Public Sewer System
Drain, Waste, Vent Piping (4a.03): • Plastic
Water Heater (see 4A.12) • Gas • Approx. Age: New Yrs. • Approximate Capacity (in gallons): 75 • Manufacturer: Bradford White • Serial Number: zm4004387
Fuel Shut Off Valves: • Natural Gas Main Valve At: Gas Meter at Exterior Wall (and furnace room)
Other Components: • Hose Bib(s) • Backflow Preventers on Hose Bibs • Pressure Regulator on Main Line • Sump Pump (see 1C.17)

PLUMBING OBSERVATIONS

General Comments
A future inspector may incorrectly assume that your main water line is made of polybutylene due to its color.

Positive Attributes
The water heater is a relatively new unit. As the typical life expectancy of water heaters is 12 to 15 years, this unit should have several years of remaining life.

RECOMMENDATIONS / OBSERVATIONS

Water Heater (see 4A.12)
• Repair: The thermostat at the water heater does not seem to correspond to the water temperature. Evaluation of the thermostat is needed. The tank produces 130 degrees when the setting is at the warm mark.
• Repair: The flame in the water heater needs adjustment to insure proper combustion. It is largely yellow.

Supply Plumbing
• Improve: Water pressure in the house is considered to be sub-standard. Pressure was tested by operating several plumbing fixtures at the same time. This may be improveable by adjustment of your pressure regulator valve (if present). Consult a plumber. The pressure drops off noticeably when multiple fixtures are operated.
• Repair: The supply pipe at the laundry sink lacks adequate support.

Fixtures
• Repair: The disposal wire restricts the operation of the sink faucet extension.
• Repair: The pedestal is missing from the sink at the half bath.
• Improve: A large gap was found under the sink top at the upper hall bath.
• Improve: The handle at the master shower is bent.
• Monitor: Improve: Repair: Access to the whirlpool motor is very difficult at best. This should be improved.
• Improve: The exterior faucets did not operate and appear to be winterized.
LIMITATIONS OF PLUMBING INSPECTION

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions:

- Portions of the plumbing system concealed by finishes and/or storage (below sinks, etc.), below the structure, or beneath the ground surface are not inspected. Overflow drains at sinks and tubs are not inspected or tested.
- Water quantity and water quality are not tested unless explicitly contracted-for and discussed in this or a separate report.
- Interiors of flues or chimneys which are not readily accessible are not inspected.
- Water conditioning systems, solar water heaters, fire and lawn sprinkler systems, and private waste disposal systems are not inspected unless explicitly contracted-for and discussed in this or a separate report.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.
DESCRIPTION OF INTERIOR (SEE 7A)

Wall And Ceiling Materials:
• Drywall

Floor Surfaces:
• Carpet  • Tile  • Vinyl/Resilient  • Concrete  • Wood

Window Type(s) & Glazing:
• Single Hung  • Double Glazed

Doors:
• Wood-Hollow Core  • French Doors  • Screen Door(s)

Tubs/Shower:
• Fiberglas  • Ceramic Tile

Tempered Glass Found:
• Shower Doors  • French Doors  • Window at Tub

INTERIOR OBSERVATIONS

Positive Aspects
Wood floors are a nice feature.

Condition of Interior Finishes
It is very common for flaws to appear in new drywall installations within the first year.

RECOMMENDATIONS / OBSERVATIONS

Wall / Ceiling Finishes
• Repair: Improve: Patching of drywall is needed at: the dining room outlet near the post, the basement office register and electric outlet, the electric panel, the wall and ceiling at the under stair closet in the basement (access is needed to the cleanout pipe also), the basement bath ceiling, the return duct at the basement, right of the fridge, at the high ceiling over the bottom of the secondary stairs (nail pops), at the laundry closet, at the half bath light, to the right of the middle level return duct, below the bay window (living room), at the doorway between the dining room and kitchen, at the front corner bedroom smoke alarm and ceiling fan plate, behind the upper hall toilet and at the wall below the shower, at the switch at the upper hall bath, at the ceiling of the Michelle closet, at the side wall of the master bedroom and at the crack near the mirror at the master bath.
• Repair: Walls, etc. were found to be crooked/out of level at: the basement toilet area, at the basement french door, at the dining room post area, at the rear rec room window and at the ceiling over the fireplace (this has been patched and still looks the same). The walls at the master bath sinks are also crooked.
• Improve: Paint is needed at the living/dining room wall where writing is still visible.

Floors
• Improve: Floor squeaks were found at: the fridge area, along the stairs in the family room, at the upper hall at the linen closet and bedroom, at the master bath door, at the front corner bedroom at the side wall, and at the rear corner bedroom at the closet.
• Repair: Floor slopes are apparent at the basement bath at the toilet.
• Improve: Shoe molding is unfinished at the basement bath.
• Improve: The wood step at the top of the basement stairs is scratched.
• Repair: A large gap was found at the library/study floor.
• Improve: Carpet needs improving at the basement steps.
• Repair: Some wood flooring is missing at the half bath.
• Improve: The trim is incomplete at the laundry closet.
• Repair: Wood flooring was found sunken near the kitchen island, scratched at the dinette and near the fridge and living room, and gaps were found at the living room.
• Improve: The master bath floor is missing some grout.
• Improve: A large gap was found in the trim at the master bedroom floor.

Windows (see 7C.17)
• **Repair:** The window at the family room right of the fireplace has no spring at its right side. The window next to it has a slanted sill and the window doesn’t close or latch.

• **Repair:** Windows at the basement rear are missing locks or have locks that don’t latch.

**Doors**

• **Improve:** Deadbolt locks at the front door do not fully latch into the frame, and therefore do not properly lock. Drilling further into the frame is needed.

• **Repair: Improve:** Doors were found to fit poorly or rub on the frame when closing at: master bath, library (doors uneven also), the deck door, the half bath, the front door, and doors close on their own and need repair at the: basement bath and middle rear bedroom (wall is dinged also).

• **Improve:** Locks were found to be inoperative or need adjustment at: the master bedroom and basement exterior door.

• **Improve:** The hinge at the garage service door is missing screws.

• **Improve:** Door stoppers are needed at: the basement storage closet and half bath.

**Kitchen Counters**

• **Monitor: Repair:** The kitchen counter appears scratched at the fridge area.

**Kitchen Cabinets**

• **Repair:** Damaged/scratched kitchen cabinets should be repaired. This was visible at: the island face, at the oven and corner area, at the cabinet over the dishwasher, right of the fridge, etc.

• **Improve:** Shelf supports and rubber bumpers are needed at some areas.

• **Improve:** The holes under the sink should be filled.

• **Repair:** A drawer at the island is inoperative.

• **Repair:** The rear of the island should be covered by a single panel and the corner trim is also missing.

**Stairways**

• **Repair: Monitor:** Stair railings at several areas appear to be slanted/out of level.

• **Improve:** The railing post halfway up the main stairs has a large gap at its bottom and the drywall needs improving here also.

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**LIMITATIONS OF INTERIOR INSPECTION**

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions:

• Furniture, storage, appliances and/or wall hangings are not moved to permit inspection and may block defects.

• Window treatments, central vacuum systems, recreational facilities, paint, wallpaper, and other finish treatments are not inspected.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.
DESCRIPTION OF APPLIANCES (SEE 8A)

Appliances Tested:
• Built-in Electric Oven (Approx. age: New)  • Gas Cooktop (Approx. age: New)
• Dishwasher (Approx. age: New)  • Microwave Oven (Approx. age: New)
• Disposal (Approx. age: New)  • Refrigerator (Approx. age: New)  • Clothes Washer (Approx. age: New)
• Clothes Dryer (Approx. age: New)

Laundry Facility:
• 240 Volt Circuit for Dryer  • Dryer Vented to Building Exterior  • 120 Volt Circuit for Washer
• Hot and Cold Water Supply for Washer  • Waste Standpipe for Washer

Other Components Tested:
• Icemaker  • Kitchen Exhaust Fan  • Cooktop Exhaust Vent/Fan  • Door Bell

APPLIANCES OBSERVATIONS

Positive Attributes
All of the appliances in the home are newer. The kitchen and laundry facilities are well organized. The kitchen cabinetry is above average quality.

General Comments
The use of metal braided hoses for the washing machine and smooth metal pipe for venting the dryer are highly recommended. These materials are stronger and will perform better than the rubber and plastic that is typically used. The dishwasher is glued in place. This may not work long term and should be monitored.

RECOMMENDATIONS / OBSERVATIONS

Refrigerator
• Repair: The refrigerator has a small dent at the top of the door and the doors do not fit evenly.
• Monitor: The operation of the icemaker was not verified. Check at walk thru.

Clothes Dryer
• Repair: The clothes dryer needs to be leveled out.

Clothes Washer
• Monitor: The washer should ideally have an overflow pan in case of leakage. A drain should be run to the floor drain at the basement also as required.

LIMITATIONS OF APPLIANCES INSPECTION

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions
• Thermostats, timers and other specialized features and controls are not tested.
• The temperature calibration, functionality of timers, effectiveness, efficiency and overall performance of appliances is outside the scope of this inspection.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.
DESCRIPTION OF FIREPLACES / WOOD STOVES (SEE 6W)

Fireplaces:
• Gas
• Zero Clearance
• Located at: family room

Vents, Flues, Chimneys:
• Outside Combustion Air Provided
• Metal Flue-Insulated Multi-Wall

FIREPLACES / WOOD STOVES OBSERVATIONS

RECOMMENDATIONS / OBSERVATIONS

Fireplaces
• Possible Repair: The wood mantle gets very hot when the fireplace has been running for a while. Consult the manufacturer.
• Repair: Screws and some cracks are visible around the mantle.

LIMITATIONS OF FIREPLACES / WOOD STOVES INSPECTION

As described in your inspection contract, this is a visual inspection limited in scope by (but not restricted to) the following conditions:
• The interiors of flues or chimneys are only partially inspected.
• Firescreens, fireplace doors, appliance gaskets and seals, automatic fuel feed devices, mantles and fireplace surrounds, combustion make-up air devices, and heat distribution assists (gravity or fan-assisted) are not inspected.
• The inspection does not involve igniting or extinguishing fires nor the determination of draft.
• Fireplace inserts, stoves, or firebox contents are not moved.

Please also refer to the pre-inspection contract for a detailed explanation of the scope of this inspection.