

Property Self-Evaluation and Plan

While a professional inspection will provide the most thorough evaluation, a property self-evaluation and plan can help your organization document and think through the building items that may need to be repaired or replaced based on regular and deferred maintenance. It also serves as a reference for future leaders of your organization. It is recommended that you complete and ensure a schedule is in place to review and update annually.

Organization Name	
Property Location	
Date of Review	
Next Review	
Attach Building Plans	

Overview of Property

Property Description

Date Built and History

People Currently Leading Building Maintenance

Current Insurance

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Licenses/Inspection Information (what, when)

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Other Important Information

Include important information that you feel is important (examples include: nuances about the building, relationships, timing, location of things such as sewer and water, attach building plans, etc.)

Building Maintenance Checklist - Basic

	Year Installed	Last Maintenance	Condition	Service Needed	When	Cost
Exterior						
Ex. Roof	1980	2019	Poor	Replace	05/2025	\$40,000
Roof						
Exterior Walls						
Paint						
Sidewalks						
Parking						
Windows						
Lighting						
Overhangs						
Signs						
Security						
ADA						
Interior						
Floor						
Interior Walls						
Ceiling						
HVAC -Heating						
HVAC - Cooling						
Kitchen						
Bathrooms						
Plumbing						
Electrical						
Lighting						
Fire/Life Safety*						
ADA						

*Fire/Life Safety - Recommend professional inspection.

Property Condition and Cost Estimate to Correct

Property Condition
Describe the current condition of the property (overall, specific, any deferred maintenance, etc.)

Cost Estimate to Correct

Below are items that have been identified for repair or replacement over the next 20 years

[illegible]

Plans for Funding

Current ways we raise funds for building	Annual amount raised

Future ways we can raise funds for building	Annual amount to raise