

Pilgrim Place Basic Preparations for Houses/Apartments

Resident Name(s): _____

Today's Date: _____

Preparation Start Date: _____

Address: _____

Target Completion Date: _____

Note: Target Completion Date is the projected date that the residence will be available for occupancy based on six- to eight-week work schedule from preparation start date. **All basic preparations are completed by Buildings and Grounds as needed.** New residents wishing to upgrade or renovate portions of their residences may do so in consultation with Pilgrim Place Buildings and Grounds and at the resident's expense. Questions regarding basic preparations, upgrades, and renovations should be addressed to the Buildings and Grounds staff. New residents pay the remainder of their Entrance Fee and begin paying the Monthly Fee when the residence is ready for occupancy, regardless of when actual move in takes place.

PAINTING

1. Patch/repair/prep for interior painting.
2. Complete interior paint or touch up in neutral Navajo White. (Other paint colors may be selected by the resident at the resident's expense. Painting will be done by Buildings and Grounds staff.)
3. Paint complete exterior as needed.

FLOOR COVERING

4. Replace carpet. (Resident to select from samples.)
5. Refinish existing hardwood floors if desired. (Installation of new hardwood floors is an upgrade at the resident's expense.)
6. Replace vinyl. (Resident to select from samples.)
7. Replace sub-floors as needed.

WINDOWS

8. Repair/replace window screens.
9. Install/repair energy-efficient dual pane windows.
10. Install/repair blinds in windows.
11. Install/repair vertical blinds in sliding doors.

HEATING AND AIR CONDITIONING

12. Check/repair existing central heating/air conditioning system.
13. Upgrade AC/heating to central forced air system.
14. Check operation of wall thermostat and repair/replace as needed.
15. Repair/replace ductwork.
16. Clean and seal duct system.
17. Install/increase insulation in attic.

APPLIANCES

18. Residences will come with a refrigerator with icemaker, stove, microwave, and dishwasher as appropriate for the housing unit. The appliances will be gas with the exception of those units where gas is not available. In the later case, the appliance will be electric. Furnished appliances will be Kenmore brand in white. (Appliance upgrades are at the resident's expense. Upgraded appliances must fit the space allotted for them between cabinets or within other structural features. See Amenities Notebook for standard and upgrade appliance models.) If five years old or older, the appliances will be replaced with new ones during the house preparation.
19. Repair/install washer/dryer. Washer/dryers will be the convertible type that can be stacked or placed side-by-side, as appropriate for the housing unit.

KITCHEN

20. Replace vinyl. (Resident to select from samples.)
21. Corian countertops in neutral color. (No upgrades to countertops)
22. Pullout shelves in lower kitchen cabinets as possible.
23. Install stainless steel sink. (Upgrade at resident expense. See Amenities Notebook for upgrade options.)
24. Replace garbage disposal as needed.
25. Replace kitchen hardware.

BATHROOM

26. Replace vinyl. (Resident to select from samples. No carpet in bathrooms.)
27. Install integrated sink and countertop.
28. Replace or re-glaze bathtub as needed.
29. Repair/replace bathroom tile/wall board as needed.
30. Replace bathroom hardware.
31. Replace medicine cabinet as needed.
32. Install one of four selected lighting fixtures above sink. (See Amenities Notebook for lighting models.)
33. Replace towel bars as needed.

CARPENTRY

34. Repair/replace doors as needed.
35. Repair/replace screen doors.
36. Repair/replace door locks. Re-key residence.
37. Install deadbolts lock on exterior doors where applicable.
38. Install doorstops as needed.
39. Repair/install weather strip on windows and doors.
40. Repair/replace thresholds.
41. Check cabinet & closet doors. Repair/replace as needed.
42. Check cabinet drawers and hardware. Repair/replace as needed.
43. Patch walls and floors interior and exterior.
44. Repair/install baseboard or cove base.

PLUMBING

45. Repair/replace faucets. (Upgrade at resident expense. See Amenities Notebook for upgrade options.)
46. Repair/replace shower/tub controls.

47. Repair/replace toilet as needed. (All toilets are standard dual flush.)
48. Repair/replace toilet seat(s).
49. Repair/replace water heater.
50. Check backflow pressure regulators and safety valves as needed.
51. Gas line for clothes dryer as applicable.
52. Gas line for stove as applicable.
53. Water pipes for washer as applicable.
54. Replace angle stops as necessary.

ELECTRICAL

55. Check all electrical and upgrade as needed.
56. Upgrade to 100 amps service.
57. Install GFI outlets/bath/kitchen as applicable.
58. Upgrade duplex outlets to three prong outlets as applicable.
59. Upgrade wall outlets, one per wall in each room as applicable.
60. Check light fixtures and change as needed.
61. Insure adequate lighting in kitchen and bath.
62. Repair/replace light switches.
63. Install/upgrade phone jacks.
64. Test smoke alarms and change battery. (All smoke alarms are hard wired.)
65. Check operation of doorbell button and chime. Repair/replace as needed.
66. Install 120V for disposal with switch.
67. 120V and 220V receptacle for dryer/washer.
68. 120V and 220V receptacle for electric range.
69. Install microwave/hood vent combination as applicable.
70. Install 120V receptacle for microwave as needed.
71. Run electric power for AC/heat.
72. Make residence TV cable ready.
73. Ceiling fans in bedroom/study. (See Amenities Notebook for ceiling fan models. Light kit is an upgrade at resident's expense.)

MISCELLANEOUS

74. Repair fence as needed.
75. Repair/replace roof as needed.
76. Clean/repair fireplace as applicable.

CLEANING

77. General interior cleaning prior to move-in date.
78. Wash windows and screens inside and out.
79. Vacuum carpets.

GROUNDS

80. General clean up including pruning and trimming.
81. Check/repair/upgrade sprinkler system.
82. Convert sprinkler system to automatic, install valve box over valves.
83. Install/replace header board around planters.

Pilgrim Place

625 Mayflower Road * Claremont, CA 91711 * 909-399-5500 * www.pilgrimplace.org

PILGRIM PLACE BASIC PREPARATIONS FOR HOUSES/APARTMENTS

Resident Name(s): _____

Address: _____

Walk-through date: _____

This three-page summary represents Pilgrim Place’s responsibility for basic preparation of a residential unit for a new resident. Please bring this document with you to your final walk-through with Buildings and Grounds staff. You will be asked to sign it at the completion of your walk-through.

Comments: _____

I have reviewed this document with Buildings and Grounds staff and acknowledge that the residence will be ready for occupancy on _____ (date).
A photocopy of this signed document will be returned to the resident.

Resident Signature: _____

Resident Signature: _____

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BASIC PREPARATIONS FOR HOUSES/APARTMENTS POLICY

Timeframe for Selections and Renovations

A prospective resident must make a decision whether or not to accept a unit within two weeks from the date it is offered to them. Within one week after accepting a unit, the resident must meet with Buildings and Grounds to make amenity selections. Resident will have two weeks after that in which they can make changes to their selections after which the selections are considered final and cannot be changed. If changes are made to selections during this additional two week period Pilgrim Place will make every effort to have the unit ready for occupancy per schedule, however if the unit is not ready as a result of these changes, rent will still begin on the original completion date.

If the preparation of a unit is more than three weeks into the work before it is selected by a prospective resident, the work will be completed using standard amenities and neutral colors. This may be modified at the resident's request if amenity items have not been purchased. If custom interior paint is requested at this late date and interior painting is underway, Buildings and Grounds will re-paint the interior using the custom paint colors however the cost of materials and labor will be charged to the resident. Paint color modification must be made within three (3) working days of accepting the unit. Rent will commence on the original completion date even if there is a delay in completing the work due to these modifications.

Resident costs will be estimated, resident must pay down payment of 75% within one month of the date they accepted a unit or have made payment arrangements with the CFO. If payment has not been received or payment arrangements have not been made within this timeframe, the work will be completed using standard amenities and materials.

RESIDENT RENOVATOR/BUILDER POLICY

As part of any new construction or major remodel, houses/apartments will be upgraded, if possible, to meet non-ambulatory accessibility requirements. Cost for these upgrades will be included as part of the Resident Renovator's cost. The architect and contractor for Renovation/Builder projects will be at the discretion of Pilgrim Place. Construction work will be bid at the request of the resident. Renovation/construction specifications shall be at the mutual agreement of Pilgrim Place and Resident Renovator, within the parameters set forth in this policy. Pilgrim Place will contract with the architect and contractor, and will oversee all work. Resident Renovator will donate 75% of the estimated cost of the project prior to commencement of work, with the balance due at the completion of the project.

If for some reason the Resident Renovator decides to abandon the project prior to making initial deposit, all costs to that point including all architect costs and fees will be the Resident Renovator's responsibility due and payable to Pilgrim Place upon request.

The Resident Renovator must make decision to/not to proceed with project within two weeks of being offered a unit. Within 90 calendar days after decision to proceed, final approval must be given by Resident Renovator on plans and cost, or the project will be closed and all incurred costs due and payable.

The allotted time for a basic preparation of a house for a new resident is 6–8 weeks therefore rent will commence eight (8) weeks following acceptance of the unit by the Resident Renovator

regardless of whether the additional work requested by the Resident Renovator is complete. Pilgrim Place will do everything possible to expedite the completion of the project.

For Resident Builder projects final approval of plans and cost must be given by the resident within 120 calendar days after their decision to do the project. Rent will commence when the unit is ready for occupancy.

Renovation/Construction Parameters:

1. Maximum size of resident built home will be 1600 square feet of living space, and a single car attached carport.
2. Maximum size of an existing home with a resident added room addition shall not exceed 1600 square feet.
3. Appliances (microwave, washer/dryer, stove, refrigerator, and dishwasher) will be subject to Pilgrim Place appliance policy.
4. Window and sliding door blinds will be installed per Pilgrim Place basic preparation policy.
5. Kitchen counter, kitchen sink, kitchen faucet, bathroom vanity sink and counter, bathroom vanity light, ceiling fans are all subject to Pilgrim Place basic preparation policy.
6. Landscape will be within the parameters set by Pilgrim Place.
7. New gas fireplace is permitted, wood burning are not.
8. Grab bars, smoke detectors, emergency call system to be installed per CCRC requirements.

Non-ambulatory Accessibility Requirements (resident-renovator cost):

1. Wheelchair accessibility to front door (ramp if applicable).
2. Wheelchair accessibility to one bathroom.

Renovator Financial Considerations:

1. For renovation projects not exceeding \$50,000:
 - a. A tax deduction letter will be issued.
2. For renovation projects greater than \$50,000 and not exceeding \$100,000:
 - a. A tax deduction letter will be issued.
 - b. During residency should one spouse/partner be forced to relocate within Pilgrim Place, or die, the independent spouse/partner may remain in the renovated unit for 5 years from the date of relocation/death of one spouse/partner, providing he/she is capable of living independently.
3. For renovation projects greater than \$100,000 and not exceeding \$150,000:
 - a. A tax deduction letter will be issued.
 - b. During residency should one spouse/partner be forced to relocate within Pilgrim Place, or die, the independent spouse/partner may remain in the renovated unit for 10 years from the date of relocation/death of one spouse/partner, providing he/she is capable of living independently.
4. For renovation projects greater than \$150,000:
 - a. A tax deduction letter will be issued.
 - b. During residency should one spouse/partner be forced to relocate within Pilgrim Place, or die, the independent spouse/partner may remain in the renovated unit for 15 years from the date of death or relocation of the spouse/partner, providing he/she is capable of living independently.