

TECHNICAL HANDBOOK FOR ENVIRONMENTAL HEALTH AND
ENGINEERING

Volume II -HEALTH CARE FACILITIES PLANNING
PART 13 -PLANNING DOCUMENTS AND REPORTS

CHAPTER 13-8 -HOUSING VERIFICATION SURVEY REPORT (HVSR)

TRANSMITTAL NOTICE (09/15/2017) TN - X BACKGROUND:

This issuance updates and revises Chapter 13-8 "Housing Verification Survey Report" of Part 13 "Planning Documents and Reports" in Volume II "Health Care Facilities Planning" of the Indian Health Service, Technical Handbook for Environmental Health and Engineering.

Date

Gary J. Hartz, P.E., Director
Office Environmental Health and Engineering
Indian Health Service

MATERIAL TRANSMITTED

1. Volume II, Chapter 13-8

HANDBOOK MAINTENANCE

1. Place this Transmittal Notice behind "TAB B" of Volume I.
2. Replace Chapter 13-8 of Volume II.

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13-8.1 INTRODUCTION

A. Purpose

The purpose of this chapter is to provide information on the requirements of a housing verification survey report (HVSr). The HVSr determines, within a defined radius of an existing or proposed new health care facility, the availability and condition of both Government and private-sector housing for the health care staff at the facility site. This report forms the basis of the new quarters construction proposal justification. It is included in the Program Justification Document for Quarters (PJDQ) for stand-alone new, or additional (to existing), quarters construction projects, or is included as a requisite tabbed section in the Program Justification Document (PJD) for a new health facility construction project that requires new quarters. The guidelines, herein, are to be used by whoever is involved, in the preparation of this necessary documentation for new quarters construction proposals.

B. Scope

This chapter addresses the IHS method for determining the need for new staff quarters at a new healthcare site or additional staff quarters at existing healthcare facility. Quarters supporting new health care facilities, which are processed concurrently with the health care facility design and construction, are also included. Updates to an original HVSr for staff quarters are required to comply with this chapter's requirements.

C. Responsibilities

The Team Leader appointed by the IHS Area Office or a Tribal organization that has compacted these services is assigned these responsibilities:

- Lead the team in performing the housing verification survey
- Prepare the HVSr with all documentation
- Submit the HVSr to whomever is preparing the PJD.

The survey team, designated by the Area Office Director or a Tribal organization, shall consist of two to four members, among which are the team leader and representatives from the Area's Planning and Facilities Offices. It is also desirable, though not required, to have team member(s) representing the service unit or organization managing the facility and/or the tribe.

D. Background

It is IHS policy - per Indian Health Manual Part 5, Chapter 13, Quarters Management - to ensure the availability of safe suitable housing for personnel essential to the continuity of the health care delivery system and for those personnel required to protect Government property, interests, and obligations.

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When a new or replacement health care facility is planned, IHS reviews the need to construct quarters units as part of the planning process. If existing facilities are expanding or adding new programs IHS may review the need for new or additional Federal quarters.

13-8.2 CRITERIA

A. Criteria, Laws, and Policies

5 U.S.C. Section 5911 - Quarters and facilities; employees in the United States. The head of an agency may provide, directly or by contract, an employee stationed in the United States with quarters and facilities, when conditions of employment or of availability of quarters warrant the action.

Office of Management and Budget Circular (OMB) No. A-45, "Rental and Construction of Government Quarters". This circular sets forth policies and administrative guidance to be used by executive agencies in establishing and administering rental rates and other charges for Government rental quarters and related facilities located within the fifty States, the District of Columbia, and the territories and possessions of the United States. It also sets forth policies and administrative guidance to be used by executive agencies respecting construction of Federally-owned housing (exclusive of military barracks) for civilian and military personnel, as well as for employees of Government contractors, whether provided on a rental basis or free of charge, both in the United States and overseas. It is the policy of the Federal Government to rely on the private housing market to provide housing for its civilian employees. Only if there is a requirement of service or protection, or if there is lack of available private housing, may agencies acquire rental quarters.

The Department of Health and Human Services Office of the Inspector General Report, April 17, 1990, provided guidance for improving the planning and construction process for IHS staff housing.

Indian Health Care Improvement Act, Public Law 94-437, mandates IHS to have its health care facilities accredited. IHS is required to maintain adequate staffing levels to maintain accreditation by the Joint Commission (JC). Therefore the lack of quarters may affect a facilities accreditation rating.

All quarters construction project proposals (PJDQ) shall include, HVSr documentation, as described in this chapter. The HVSr documents shall include the completed standard forms, as exhibits. The HVSr and forms templates, may be obtained from the Office of Environmental Health and Engineering (OEHE) website at <http://www.ihs.gov/oehe/>.

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13-8.3 DEFINITIONS

- A. *Construction Priority List (CPL)* - a list of construction projects, each of which have been evaluated and have a Program Justification Document (PJD), approved by the Director of the Office of Environmental and Engineering (OEHE).
- B. *Demonstrated Preference Community* - a city or town having a year-round population of less than 1,500 (less than 5,000 in Alaska), and where a demonstrated preference to reside is indicated by non-local IHS staff currently residing in this community and is located 50 road miles (75 kilometers) or less from the healthcare facility.
- C. *Government Quarters (GQ)* - Government-controlled housing units which are, or can be, assigned to non-local IHS personnel. This includes existing IHS quarters units which are IHS-owned or - leased and located 50 road-miles (75 kilometers) or less from the health care facility. It also includes other Government quarters units owned or leased by other Government agencies, located 50 road miles or less from the health care facility, which are available to IHS for occupancy by IHS staff. Quarters are categorized as either rental or transient quarters units.
- D. *Housing Verification Survey Report (HVSr)* - a survey of Government quarters units and private-sector housing to determine the total number of local housing units (both Government-and privately-controlled) available, for occupancy by IHS staff, at a particular location.
- E. *Installation* - separately located and defined real property parcel that includes a number of buildings, structures, and utilities systems, and generally is the focal point for a defined IHS service area. Each installation is assigned a unique identification number in the Real Property Inventory.
- F. *Local Staff* - A staff member who resides 50 road-miles or less from the health care facility at the time of his/her employment in that facility.
- G. *Non-Local Staff* - A staff member who resides more than 50 road-miles from the health care facility at the time of his/her employment in that facility. *Private-Sector Housing (LP)* - all types of housing units, except Government quarters units, which would be available to an IHS Staff member to own, rent, or otherwise occupy. *Quarters Quality Rating* - an evaluation of both the interior and exterior conditions of each Government quarters unit. This is the rating reported in the Department of Interior (DOI) Internet Quarters Management Information System (iQMIS). Each time a quarters unit is reconditioned or made available for occupancy, the Area Realty Management Officer will assign a quality rating per the Area facilities management staff's quality rating determination.
- H. *Health Facilities Database System (HFDS)*. The HFDS is a repository for US Government and Tribal Real Property Assets within IHS and is used to manage the backlog of deficiencies using Facilities Engineering Deficiency System

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- I. *Internet Quarters Management Information System (iQMIS)*. The iQMIS system was developed by the DOI for establishing consistent rental rates for Government quarters. The iQMIS database is managed by the DOI/Interior Business Center (IBC) through an interagency agreement with the IHS.
- J. *Recognized Community* - an incorporated or unincorporated city or town having a year-round population of 1,500 or more (5,000 or more in Alaska). These communities will be separated into two zones. A Core zone located 50 road-miles or less from the healthcare facility and a Secondary zone located between 50 and 65 road miles from the healthcare facility.
- K. *Rental Quarters Units* - Quarters intended for other than transient occupancy by a member of the IHS staff or other authorized person. Persons assigned to rental quarters units are always charged for rent and utilities.
- L. *Transient Quarters units* - Quarters units intended for short-term occupancy of up to 90 days. Their purpose is to accommodate official visitors, guests, volunteers, and short-term staff and contractors, and other transient personnel.
- M. *Vacancy Rate* - a recurring rate reflecting the extent of vacant housing over a period of time to which the local economy will continue to adjust; it will usually remain constant over time.

13-8.4 HOUSING VERIFICATION SURVEY REPORT (HVSr) METHODOLOGY

The general format of the HVSr, and the information required, is described as follows.

- A. Signature Page – provide a signature page for each HVSr indicating the following:
 - a. For HVSr prepared by IHS personnel or Tribal organizations other than Title V
 - Signature and date of the preparer.
 - Signature and date of the Area Office planning officer, if applicable.
 - Signature and date of the Director of Engineering Services, if applicable.
 - Signature and date of the Tribal organization official, if applicable.
 - Signature and date of the Area Office Associate Director (Reviewer/Recommender).
 - Signature and date of the Area Office Director (Approver).
 - b. For HVSr prepared by Title V Organizations
 - **Only** the signature and date of Tribal Leader recommending the report is needed on the signature Page.
- B. Table of Contents - indicate the location of the chapters, sections, main subdivisions, and tabs.

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C. Introduction and Purpose - include the following in this section:

- *Purpose* - describe the reasons for performing the housing verifications survey. Indicate that the survey is required for the IHS PJDQ (or PJD if appropriate), or that a HVSR is being updated. In either case, it is done in accordance with guidelines of this IHS technical handbook, and provides IHS with a current verifiable count of both Government and private-sector housing units available locally for occupancy by IHS staff.
- *Survey Team* - identify the name and organization of the team leader and members of the survey team.
- *Description of Project* - provide a general overview of the proposed quarters project, including the location of the project and the reason why new staff quarters units are needed (e.g., construction of a new hospital).
- *Description of Survey Area* - provide general information about the survey area which contributes to the living conditions; e.g., geography, demographics, weather, economy, remoteness, etc. Include a general location/site map.

D. Existing Government Units - included with the Phase II Quarters Construction Priority System (QCPS) (and provided to the survey team by the Area Office) is a listing of the status of all assignable IHS-owned or - leased quarters units, located 50 road miles or less from the health care facility. This same information, as appropriate, is also provided for other Government quarters units, located 50 road miles or less from the health care facility, which are available to IHS for occupancy by IHS staff. The survey team will verify the accuracy of this information and provide a corrected listing of this data, for each location, as illustrated in Exhibit 1, at the end of this section, for all existing Government quarters units. The listing includes the following:

- *Area* - Enter the name of the IHS Area Office.
- *Date* - Enter the date that this HVSR worksheet was completed.
- *Service Unit* - Enter the name of the IHS service unit in which the existing Government quarters units are located.
- *Installation Number* - Within each service unit, there may be more than one installation. The installation number in which the existing quarters units are located is taken from the Health Facilities Database System (HFDS).
- *Location/Distance* - Include the city, state, and road distance the existing Government quarters units are from the health care facility. A site map, showing the location of existing Government units in relation to the health care facility, shall also be provided.
- *Total Number of Government Quarters Units at This Location* - Provide the total number of existing IHS Government quarters units and the total of those owned by other Government agencies (even if they are not available to IHS),

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- *Owner* - List the government agency that owns the quarters units; e.g., IHS, Bureau of Indian Affairs (BIA), Department of Defense, etc.
- *Building Number* - Enter the five-digit number assigned to the quarters unit which matches the iQMIS database.
- *Quarters Unit Designation* - Enter the IHS quarters unit designation as either "rental" or "transient" as defined in the Quarters Program, Chapter 13, Part V5, Indian Health Manual.
- *Quarters Unit Description* - Enter the type of quarters unit; e.g., "Residence 2BR" for a two-bedroom residence, "Apartment IBR", "Trailer 2 BR", etc., which matches the iQMIS database.
- *Internal Condition* - Enter the rating which matches the iQMIS database. The quality rating is determined by the Area facilities management staff each time a quarters unit is reconditioned or made available for occupancy. An inspection to verify the quality condition is necessary only for those units for which the internal or external condition is listed as poor or obsolete/substandard. Poor is defined as needing major repairs; substantial deferred maintenance is evident. An obsolete/substandard condition is one in which the quarters unit is not fit for human habitation; major health and safety violations are evident. The IHS Quarters Program requires that any quarters unit designated in the poor or obsolete/substandard condition shall be repaired and upgraded to at least fair condition within one year of such designation. Otherwise, disposal action or reclassification shall be initiated. Both the internal and external quarters unit condition shall be rated at least fair in order to be suitable for the intended occupant.
- *External Condition* - Use the same criteria as "internal condition" above. The information on IHS Government quarters units shall match the data in the iQMIS database, as the number of assignable IHS quarters units is verified using this database. If the iQMIS database is not current and contains inaccurate data, the information shall be updated prior to submission of Phase III of the QCPS.

For each unit designated as poor or obsolete/substandard, include the following supplemental information as an attachment to this listing:

- *Deficiencies* - describe the major deficiencies of the quarters units which are the basis for the poor or obsolete/substandard quality rating.
- *Cost Estimate* - provide a cost estimate to renovate and correct the major deficiencies of the unit.
- *Feasibility* - determine the economic feasibility of renovating the unit versus constructing a replacement unit. Factors to be considered in this evaluation include cost of renovation versus cost of a new unit, projected service life of the unit, operation and maintenance requirements, etc.

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- *Recommended Action* - For quarters units determined to be unfeasible to renovate, recommend how these units are to be disposed after they are replaced with new quarters units.

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- E. Private-sector Housing Market - In this section describe the local private-sector housing units available for sale and rent in communities located in two zones: 1) (Core zone) 50 road miles or less from the health care facility, and 2) (Secondary zone) between 50 and 65 miles from the health care facility. The surveyed communities (including the community in which the health care facility is located) consist of all local "recognized" communities and other local communities where a "demonstrated preference" to reside is indicated. Population and distance (based on road miles using the most efficient time route) figures are taken from the latest edition of the Rand McNally Road Atlas. Alternatively, information for tabulating distances and commuting areas may also be obtained from an online source e.g., [MapQuest](#) or [Google Maps](#). (Do not count income-producing properties such as farms).

Where more than one IHS facility is within a zone, assume that the number of private-sector quarters units available to the IHS staff in that community (i.e., the average vacancy rate) will be used to calculate housing available for each nearby facility. Therefore available vacant private-sector housing shall not be prorated among nearby facility locations.

The survey team shall explore the following resources, as appropriate, to obtain information about each of the communities surveyed. This will enable an accurate accounting of available private-sector housing units. When possible, the team shall make appointments to meet with these people, rather than arrive unexpectedly. For HVSR updating, census information on population in various communities can be obtained from www.census.gov to determine population growth and population percentage change between census dates.

- *Local Realtors* - Contact or access, local realtors and/or their websites to acquire sales history, market conditions, availability, unit size, average time on market, selling prices, trends, etc.
- *Property Management Companies/Local Housing Authority/State Human Resources Development Council* - These are a source of rental unit information that can provide management services for owners of multiple-family units (apartments, townhouses, condominiums, etc.) and single-family residences; or provide programs for rental to low income families.
- *Financial Institutions* - Information can be obtained from banks, savings and loans, and credit unions concerning real estate activities, mortgage loan information, interest rates, special financing programs, repossessed houses, etc.
- *Chamber of Commerce/Community Development Offices* - Detailed information is often available regarding community amenities, services, transportation, industries, retail stores, and recreational activities.
- *Utility Companies* - Local utility companies (electric, gas, etc.) are often a good source for community profiles, services, demographic trends, etc.
- *Title Companies* - Title companies are a good source for information regarding past real estate activity.

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- *Clerk and Recorder/Assessors Offices* - Records of past transactions can be obtained at the County seat.
- *Tribal Housing Authorities* - Tribe may own housing units that could be available for IHS Staff to rent.
- *Department of Housing and Urban Development (HUD)* - The regional HUD office can provide information on foreclosures and general real estate activity.

For each recognized and demonstrated preference community (including the community in which the healthcare facility is located), that is located 65 road miles or less from the health care facility and is considered in this report, provide the following information:

Community Name and State

- *Location* - Road-miles and direction from the health care facility. Reference an attached site map which shows the location of the community relative to the health care facility. Distance (based on road-miles using the most efficient time route) figures obtained from [MapQuest](#) or [Google Maps](#).
- *Population* - Population of communities in zone 1 and 2 obtained from [www.census.gov](#).
- *Method of Access* - Type, size, condition, and general maintenance of roads from the community to the health care facility. Include the type and frequency of restricted driving conditions or road closures due to weather, etc. Describe the availability of public transportation.
- *Services/Amenities Available* - Describe the availability of community services, educational opportunities, medical/dental care, fire and police protection, retail services, employment opportunities, recreational facilities, and any other pertinent information which helps characterize the community.
- *Non-Local Staff* - Quantify the number of non-local staff (employee) residing in this community.
- *Average Number of Housing Units for Sale* - Provide historical data on the average number of housing units (do not count income-producing properties such as farms) available for sale at any time. Because of the cyclic nature of many housing markets, it is recommended that a minimum of one year of historical data be evaluated, at sufficient intervals, to provide a realistic average. Provide the data by the number of bedrooms and sales price, for each location, in a tabular format as illustrated in Exhibit 2, at the end of this section.
- *Average Number of Housing Units for Rent* - Provide historical data on the average number of housing units (do not count income-producing properties such as farms) available for rent at any time; i.e., the average vacancy rate multiplied by the total number of rental units. Data shall cover, at least, the most recent one-year period and be evaluated, at sufficient intervals, to provide a realistic average. Provide the data by the number of bedrooms and monthly rental price in a tabular format, as illustrated in Exhibit 2.
- *Source of Data* - Provide the sources of data for each community. Include the name,

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job title, company name, address, and phone number of sources. This information will be used for future verification and updates.

Exhibit 2 HOUSING VERIFICATION SURVEY REPORT Local Housing Market					
Community _____			Population _____		
Distance from Health Care Facility _____			miles		
Survey Period	Average Number of Units for Sale				
Price	1 Bedrooms	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Total
Less than \$75K					
\$75K to \$100K					
\$100K to \$150K					
\$150K to \$200K					
\$200K to \$250K					
\$250 K to \$300K					
\$300K to \$350K					
\$350K to \$400K					
+\$400K					
Total					
Monthly Lease	Average Number of Units for Rent				
Price	1 Bedrooms	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Total
Less than \$300					
\$300 to \$500					
\$500 to \$750					
\$750 to \$1000					
\$1000 to \$1500					
\$1500 to \$2000					
\$2000 to \$2500					
\$2500 to \$3000					
\$3000 +					
Total					

F. Non-Local Staff Interviews - The survey team shall interview a representative sample of IHS non-local staff and report their findings in this section of the HVSr. The purpose of these interviews is to determine the staff housing preferences and opinions concerning the local conditions. Exhibit 3 provides examples of questions such as turnover of staff, rent versus purchase, local build, personal preferences, etc. It is recommended these interviews be conducted in groups of three to five to foster group interaction and stimulate discussion.

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Exhibit 3 HOUSING VERIFICATION SURVEY REPORT Non-local Staff Interviews						
Area _____			Date _____			
Service Unit _____			Installation _____			
Location _____						
The turnover rate at this facility _____						
	Answers					
IHS Staff member	# 1	# 2	# 3	# 4	#5	Average
Time at Facility (yr.)						
Commuting Distance (mi)						
Do you prefer renting?						
Do you have lease?						
Do you have a sub-lease?						
Do you prefer buying?						
Do you prefer to build a house?						
Do you prefer detached houses?						
Do you prefer duplexes?						
Do you prefer multiplex (apartments)						
Do you have more than one vehicle?						
Do you have children?						
The average age of the children.						
Recreational activities your family likes.						

G. Summary and Conclusions - A summary of the information shall be presented in the format illustrated in Exhibit 4, at the end of this section. This summarizes the results of the survey concerning the number of local Government quarters units and local private-sector housing units, which may be reasonably expected to be available for non-local IHS staff at a particular location.

When summarizing this information, all existing IHS Government quarters units are counted. This total is reduced by the number of "poor" and "obsolete/substandard" units that are unfeasible to renovate. Other Government quarters units, located 50 road-miles or less from the health care facility, are counted only to the extent they are available to IHS for occupancy by IHS staff.

The assumption is made that only **25** percent of the housing units from the local private-sector housing units in the **core zone** will be suitable, available, and affordable

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to non-local IHS staff. The assumption is made that only **10** percent of the housing units from the local private-sector housing units in the **secondary zone** will be suitable, available, and affordable to non-local IHS staff. If the survey team considers the percentage adjustment factors either too high or too low for a specific location, a more realistic factor shall be recommended and supported with justification. The components which comprise this adjustment factor are as follows:

- *Suitability* - Not all housing units will be suitable to IHS staff because of the condition, size, or location of the units within a recognized community.
- *Availability* - Seasonal variations in the housing market and the relative supply and demand for housing influence the number of units that may be available to IHS staff.
- *Affordability* - This relates to the income of the staff member relative to the cost of housing. It also pertains to the local real estate market; **e.g.**, ability to sell or sublet, if transferred; rate of appreciation; interest rates; etc.

H. Attachments - Include in a tabbed section at the end of this report, pertinent information such as area maps, photos, and published data from local civic organizations and realtors.

Exhibit 4 HOUSING VERIFICATION SURVEY REPORT Private Sector Housing Market					
Area	Service Unit (If Applicable)			Date	
COMMUNITY	AVERAGE DISTANCE FROM HEALTH CARE FACILITY (mi)	POPULATION	PROJECTED PRIVATE HOUSING UNITS AVAILABLE	ADJUSTMENT FACTOR	UNITS AVAILABLE FOR IHS NON-LOCAL STAFF
TOTAL HOUSING UNITS AVAILABLE FOR IHS NON-LOCAL STAFF					

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**13-8.5 PROGRAM JUSTIFICATION DOCUMENT/PROGRAM OF REQUIREMENTS for
QUARTERS (PJDQ/PORQ)**

After completion of the HVSR, the culmination of the Quarters Construction Priority System (QCPS) process is the Area Office's submission of a PJDQ that justifies the number of quarters (transient and rental) units proposed for construction. A prototype PJDQ is located in Chapter 13-6 of this Technical Handbook. Most of the information required for the PJDQ can be compiled from the HVSR and by updating information from the QCPS Phase II application.

Headquarters IHS reviews the PJDQ, and if it determines that construction of additional quarters units is adequately justified, the PJDQ is approved by IHS Headquarters Associate Director, OEHE.

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13-8.6 PROTOTYPE HOUSING VERIFICATION SURVEY REPORT (HVSR)

HOUSING VERIFICATION SURVEY REPORT

[Name of Health Care Facility] [Location], [State] (Project no.) [Month] [Year]

[Name of Organization completing the Survey]

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RECOMMEND APPROVAL:

TITLE V TRIBES ARE NOT REQUIRED TO COMPLETE
THIS SIGNATURE PAGE, BUT THE DOCUMENT
SHOULD HAVE THE SIGNATURE OF THE PERSON
RECOMMENDING THE REPORT

[Team leader Name]

Date

[Name of Area] Area Indian Health Service Indian Health Service or tribal organization

[Name] Planning Officer (if applicable)]

Date

[Name of Area] Area Indian Health Service Indian Health Service or tribal organization

[Name] [Associate Director or Facilities Manager]

Date

[Name of Area] Area Indian Health Service Office of Environmental Health and Engineering Indian Health Service

[Name] Director (if applicable)]

Date

Engineering Services - Indian Health Service

APPROVE:

[Name] Director

Date

[Name of Area] Area Indian Health Service

Office of Environmental Health and Engineering Indian Health Service

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(NOTE to the planner: Insert an automatic Table of Contents)

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LIST OF ABBREVIATIONS

AI/AN	American Indian & Alaska Native
ARH	Alternative Rural Hospital
BIA	Bureau of Indian Affairs
CEO	Chief Executive Officer
DES	Division of Engineering Services
FTE	Full Time Equivalent
FY	fiscal year
HVSR	Housing Verification Survey Report
mi	miles
NLPSH	Non-local private-sector housing
PJD	Program Justification Document
PJDQ	Program Justification Document for Quarters
PORQ	Program of Requirements for Quarters
PSA	Primary Service Area
SSER	Site Selection and Evaluation Report
SU	Service Unit
UFAS	Uniform Federal Accessibility Standards

(NOTE to the planner: As applicable, modify abbreviations to reflect the document.)

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DEFINITIONS

Demonstrated Preference Community - an incorporated or unincorporated city or town (located 50 road-miles or less from the healthcare facility) having a year-round population of less than 1,500, (less than 5,000 in Alaska) and where a demonstrated preference to reside is indicated by non-local IHS staff currently residing in this community.

Government Quarters (GQ) - Government-controlled housing units which are, or can be, assigned to non-local IHS personnel. This includes existing IHS quarters units which are IHS-owned or - leased and located 50 road-miles or less from the health care facility. It also includes other Government quarters units owned or leased by other Government agencies, located 50 road miles or less from the health care facility, which are available to IHS for occupancy by IHS staff. Quarters are categorized as either rental or transient quarters units.

Housing Verification Survey Report (HVSr) - survey of Government quarters units and private-sector housing to determine the total number of local housing units (both Government-and privately-controlled) available for occupancy by IHS staff, at a particular location.

Installation - separately located and defined real property parcel that includes a number of buildings, structures, and utilities systems, and generally is the focal point for a defined IHS service area. Each installation is assigned a unique identification number in the Real Property Inventory.

Internet Quarters Management Information System (iQMIS) - a computerized inventory (database) of IHS-controlled quarters units. The iQMIS is used to monitor quarters utilization and Area implementation of quarters management policies and practices.

Local Staff - a member of the staff who resides 50 road-miles or less from the health care facility at the time of his/her employment in that facility

Non-Local Staff - a member of the staff who resides more than 50 road-miles from the health care facility at the time of his/her employment in that facility.

Private-Sector Housing (PSH) - all types of housing units, except Government quarters units, which would be available to IHS Staff to own, rent, or otherwise occupy.

Quarters Construction Priority List (QCPL) - a list of quarters construction projects, each of which have been evaluated by the QCPS methodology and have a Program Justification Document (PJDQ) and/or Program of Requirements for Quarters PCRQ, respectively approved by the Director and Associate Director, Office of Environmental and Engineering (OEHE). The priority list for new quarters construction is generally maintained at ten projects. In the annual funding cycle, only a portion of these projects may be funded for construction and removed from the priority list.

Quarters Construction Priority System (QCPS) - a three-phase process that permits the IHS to review, evaluate, and rank proposals for quarters construction projects, based on the relative need for quarters units. Each phase provides a progressively more rigorous evaluation so that only the projects with the greatest need are advanced through the three phases and ultimately added to the Quarters Construction Priority List. (Refer to this Technical Handbook Chapter 12-2 for

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further details.)

Quarters Quality Rating - an evaluation of both the interior and exterior conditions of each Government quarters unit. This is the rating reported in the Internet Quarters Management Information System (iQMIS) database. The Area Realty Management Officer will assign a quality rating per the Area facilities management staff's quality rating determination each time a quarters unit is reconditioned or made available for occupancy,

Recognized Community - an incorporated or unincorporated city or town having a year-round population of 1,500 or more (5,000 or more in Alaska). These communities will be separated into two zones. A Core zone located 50 road-miles or less from the healthcare facility and a Secondary zone located between 50 and 65 road miles from the healthcare facility.

Rental Quarters Units - Quarters intended for other than transient occupancy by an authorized person. Persons assigned to rental quarters units are always charged for rent and utilities.

Transient Quarters Units - Quarters units intended for short-term occupancy of up to 90 days. Their purpose is to accommodate official visitors, guests, volunteers, and short-term staff and contractors, and other transient personnel. Persons assigned to transient quarters units are charged for rent and utilities.

Vacancy Rate - A recurring rate reflecting the extent of vacant housing over a period of time to which the local economy will continue to adjust; it will usually remain constant over time.

(NOTE to the planner: As applicable, add definitions to reflect the document.)

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I. INTRODUCTION

A. Purpose: This Housing Verification Survey Report (HVSr) presents data and reasoning to justify **[or update an earlier survey, dated [date]] (NOTE to the planner: As applicable, modify wording to reflect the situation.)** the construction of **[number (quantity)]** new staff quarters units, providing **[number (quantity)] [replacement or additional]** for quarters units at the Indian Health Service (IHS) **[name of health care facility] in [location of health care facility], near [name of nearest large city, in state name].** This health care facility is under the jurisdiction of the **[name]** Area Office, in **[city name, state name].** It has been done in compliance with the IHS guidelines of the Technical Handbook, Chapter 13-8, to provide a **[current updated]** verifiable count of both Government and private-sector housing available locally for occupancy by IHS staff.

The HVSr was begun concurrently with Phase II Quarters Construction Priority System (QCPS) development, which shares common information requirements. It is a required element of the Phase III of the (QCPS) process. It was finished on **[date]**, prior to beginning the **[PJD or PJDQ]** document preparation, supplementing it with necessary developmental information.

This is being submitted with the **[Program Justification Document or Program Justification Document for Staff Housing]** for the **[proposed new or existing] [name of health care facility].** The HVSr team investigated the local area, and communities in the vicinity of the **[proposed or existing]** health care facility, to determine the availability of safe, suitable housing for personnel essential to the continuity of the health care delivery system. It has been determined that there is a shortage of **[number (quantity)]** suitable housing units to meet the health care delivery needs at **[name]** Area Office **[name of health care facility].** This is due to **[there being no health care facility at this site or insufficient IHS staff quarters and/or local housing to allow the existing health care facility to fill its existing vacancies and/or to provide new health care services.]**

B. Survey Team: **(NOTE to Planner: Identify the name and organization of the team leader and numbers of the survey team. Describe briefly the team's approach, referring Tabs at the end of the report for details.)** The Housing Verification Survey Team consisted of the following members:

[Name], Team Leader, [Organization or Area]; [Name], Planning Officer, [Organization]; [Name, discipline and organization of team members]

(NOTE to the planner: As applicable, modify wording to reflect the situation.) The survey team conducted the survey, including interviews with **[staff, various community officials, local realtors, etc.]**, listed in Tab B, between **[Date to Date]**, in the communities of **[name, name, and name], [number, number, and number]** of road-miles from the **[proposed new or existing]** health care facility. The team also **[surveyed the exterior of existing staff quarters at the facility and/or reviewed the Area Office's listing of existing staff quarters and their condition.]**

C. Description of the Project: **(NOTE to the planner: As applicable, modify wording to reflect the situation.):** Provide a general overview of the proposed quarters project, including the location of the project and the reason why new staff quarters units are needed (e.g., construction of a new hospital.) The **[name]** Reservation is located in **[describe the part of state in which it is located and its relationship to the IHS Area Office].** Under the control of IHS **[name]** Service Unit, the **[name of health care facility]** is located in the community of **[name]**, which is located **[number]** miles (mi) **[compass direction]** of the

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[name of IHS Area office] Area IHS in [location name, state name].

(NOTE to the planner: As applicable, modify wording to reflect the situation.) The [name] Service Unit covers approximately [number (size)] square miles (mi) and is located in the [location/direction] part of [name of state]. The [name] Service Unit is subdivided into [number] primary service areas, the [name] Service Area, and the [name] Service Area. The [name] Service Area is located in the county/counties of [name(s)], and includes the communities of [list names of included communities]; with health care services being provided from a [type of health care facility] in [name of location]. Refer to Tab A for maps showing the location of the reservation, service unit and service area(s).

(NOTE to the planner: As applicable, modify wording to reflect the situation.) Maps are to note clearly, at a minimum, the locations of all IHS health care facilities, with the respective service areas being clearly shown. The location of the adjacent communities within, 65 road-miles distance from the health care facility where staff quarters are being proposed shall also be clearly indicated on the map(s). A legend legibly showing the scale and population size designations for the communities/ towns/ cities shall be added (if not already included), as well as the north directional arrow.)

D. Description of Survey Area - **(NOTE to the planner: As applicable, modify wording to reflect the situation.)** Provide general information about the survey area which contributes to the living conditions; e.g., geography, demographics, weather, economy, and other similar factors. Include a general location/site map of the specific area of concern.)

(NOTE to the planner: As applicable, modify wording to reflect the situation.) Describe the housing in the area and its availability. Discuss any planned future community developments.

Included with Phase II of the QCPS (and provided to the survey team by the Area Office) is a listing of the status of all assignable IHS-owned or - leased quarters units located 50 road-miles or less from the health care facility which are available to IHS for occupancy by IHS staff. The survey team verified the accuracy of this information and provided a corrected listing of this data, as illustrated in Exhibit 1, at the end of this section, for all existing Government quarters units, at various locations.

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II. PRIVATE-SECTOR HOUSING MARKET

(NOTE to the planner: Describe the local private-sector housing units available for sale and rent in Demonstrated Preference communities located 50 road miles or less from the health care facility and the Recognized Communities located 65 road miles or less from the health care facility. List all communities within that range, with the required information on an Exhibit 2 sheet for each community.)

(NOTE to the planner: For each community used in Exhibit 2 from the health center, note the following: [Where more than one IHS facility is within 50 miles of the community, it was assumed that the number of private-sector quarters units available to the IHS staff in that community (i.e. the average vacancy rate) was the same for each, to calculate housing available for each nearby facility. Therefore, available vacant private-sector housing was not reported among nearby facility locations.]

The surveyed communities are as follows. Note that the population and distance (based on road-miles using the most efficient time route) figures were taken from the [year] edition of the Rand McNally Road Atlas. **[Alternatively, information for tabulating distances and commuting areas was obtained from www.XXX.com.]** (Income-producing properties such as farms were not included in the available housing.) Additional information is provided in Exhibit 2, for each location, on the units available for rent or for sale with rent and price ranges, at the end of this section. Findings from staff interviews are located in Tab [].

[Name of category] includes the health care facility.

A. Local "Recognized" Communities:

(NOTE to the planner: For each Demonstrated Preference communities located 50 road miles or less from the health care facility and each Recognized Communities located 65 road miles or less from the health care facility, list the following, and complete an Exhibit 2.)

1. **[Name of community], [state]**

a. Location - **[number]** road miles **[compass direction]** from the health care facility.

b. Population - **[number]**

c. Method of Access - **[Describe the type, Size, condition, and general maintenance of roads from the community to the health care facility. Include the type and frequency of restricted driving conditions or road closures due to weather, etc. Describe the availability of public transportation.]**

d. Average Number of Housing Units for Sale - [Provide historical data on the average number of housing units (do not count income-producing properties such as farms) available for sale at any time. Because of the cyclic nature of many housing markets, it is recommended that a minimum of one year of historical data be evaluated, at sufficient intervals, to provide a realistic average. Provide data by the number of bedrooms and sales price in the tabular format, illustrated in Exhibit 2, at the end of this section.]

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e. *Average Number of Housing Units for Rent* - [Provide historical data on the average number of housing units (do not count income-producing properties such as farms) available for rent at any time; Le., the average vacancy rate multiplied by the total number of rental units data shall cover, at least, the most recent one-year period and be evaluated, at sufficient intervals, to provide a realistic average. Provide the data by the number of bedrooms and monthly rental price in the tabular format, illustrated in Exhibit 2].

f. *Source* - [Provide the sources of data for each community. Include the name, job title, company name, address, and phone number of sources. This information will be used for future verification and updates. Identify the Tab name used for such at the end of the report.]

A. "Demonstrated Preference" to Reside Communities:

(NOTE to the planner: For each Demonstrated Preference communities located 50 road miles or less from the health care facility and each Recognized Communities located 65 road miles or less from the health care facility, list the following and complete an Exhibit 2.)

1. [Name of community], [State]

a. *Location* - [number] road miles [compass direction] from the health care facility,

b. *Population* - [number]

c. *Method of Access* - **[Describe the type, size, condition, and general maintenance of roads from the community to the health care facility. Include the type and frequency of restricted driving conditions or road closures due to weather, etc. Describe the availability of public transportation.]**

d. *Services/Amenities Available* - **[Describe the availability of community services, educational opportunities, medical/dental care, fire and police protection, retail services, employment opportunities, recreational facilities, and any other pertinent information which helps characterize the community.]**

e. *Non-Local Staff Residency* - **[Quantify the number of non-local staff (employee) residing in this community.]**

f. *Average Number of Housing Units for Sale* - **[Provide historical data on the average number of housing units (do not count income-producing properties such as farms) available for sale at any time. Because of the cyclic nature of many housing markets, it is recommended that a minimum of one year of historical data be evaluated, at sufficient intervals, to provide a realistic average. Provide the data by the number of bedrooms and sales price in the tabular format, illustrated in Exhibit 2, at the end of this section.]**

g. *Average Number of Housing Units for Rent* - **[Provide historical data on the average number of housing units do not count income-producing properties such as farms available for rent at any time; i.e., the average vacancy rate multiplied by the total number of rental units data shall cover, at least, the most recent one-year period and be evaluated, at sufficient intervals, to provide a realistic average. Provide the data by the number of bedrooms and monthly rental price in the tabular format, illustrated in Exhibit 2).]**

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h. Source - [Provide the sources of data for each community. Include the name, job title, company name, address, and phone number of sources. This information will be used for future verification and updates. Identify the Tab name at the end of the report.]

- C. Sources of Information - The survey team explored the following resources to obtain information about each of the communities surveyed. This enabled a more accurate accounting of available private-sector housing units. The sources, with names, addresses, and telephone numbers, are listed in Tab [] at the end of this report.

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Exhibit 2 Local Housing Market

Exhibit 2 HOUSING VERIFICATION SURVEY REPORT Local Housing Market					
Community _____			Population _____		
Distance from Health Care Facility _____			miles _____		
Survey Period	Average Number of Units for Sale				
Price	1 Bedrooms	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Total
Less than \$75K					
\$75K to \$100K					
\$100K to \$150K					
\$150K to \$200K					
\$200K to \$250K					
\$250 K to \$300K					
\$300K to \$350K					
\$350K to \$400K					
+\$400K					
Total					
Monthly Lease	Average Number of Units for Rent				
	1 Bedrooms	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Total
Less than \$300					
\$300 to \$500					
\$500 to \$750					
\$750 to \$1000					
\$1000 to \$1500					
\$1500 to \$2000					
\$2000 to \$2500					
\$2500 to \$3000					
\$3000 +					
Total					

(NOTE to the planner: As applicable, modify wording to reflect the situation.)

- *Local Realtors* - To acquire sales history, market conditions, availability, unit size, average time on market, selling prices, trends, etc.
- *Property Management Companies/Local Housing Authority/State Human Resources Development Council* - Source of rental unit information on multiple-family units (apartments, townhouses, condominiums, etc.) and single-family residences; or provide programs for rental to low-income families.
- *Financial Institutions* - Banks, savings and loans, and credit unions concerning real estate activities,

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mortgage loan information, interest rates, special financing programs, repossessed houses, etc.

- *Chamber of Commerce/Community Development Offices/Local Housing Authority* - Detailed information on community amenities, services, transportation, industries, retail stores, and recreational activities.
 - *Utility Companies* - Local utility companies (electric, gas, etc.) for community profiles, services, demographic trends, etc.
 - *Title companies* - For information regarding past real estate activity.
 - *Clerk and Recorder/Assessors Offices* - Records of past transactions at the County seat.
 - *Tribal Housing Authorities* - Tribe may own housing units that could be available for IHS Staff to rent.
 - *Department of Housing and Urban Development (DHUD)* - The regional DHUD office for information on foreclosures and general real estate activity.
- D. Non-Local Staff Interviews - The survey team interviewed a representative sample of IHS non-local staff, in groups of three to five to foster group interaction and stimulate discussion. The findings are reported at the end of this report, under Tab []. The purpose of these interviews was to determine the staff housing preferences and opinions concerning the local conditions. Exhibit 3, at the end of this section, documents the interviews conducted.
- E. Attachments - Pertinent information such as area maps, photos, and published data from local civic organizations and realtors, are located in Tab [], at the end of this report.

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Exhibit 3 Non-local Staff Interviews

Exhibit 3 HOUSING VERIFICATION SURVEY REPORT Non-local Staff Interviews						
Area _____				Date _____		
Service Unit _____				Insulation _____		
Location _____						
The turnover rate at this facility _____						
	Answers					
Staff Member	# 1	# 2	# 3	# 4	#5	Average
Time at Facility (yr.)						
Commuting Distance (mi)						
Do you prefer renting?						
Do you have lease?						
Do you have a sub-lease?						
Do you prefer buying?						
Do you prefer to build a house?						
Do you prefer detached houses?						
Do you prefer duplexes?						
Do you prefer multiplex (apartments)						
Do you have more than one vehicle?						
Do you have children?						
The average age of the children.						
Recreational activities your family likes.						

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IV. Summary and Conclusions

A summary of the information reported in the previous sections of this HVSR is illustrated in Exhibit 4, at the end of this section. This summarizes the results of the survey concerning the number of local Government quarters units and local private-sector housing units which may be reasonably expected to be available for non-local IHS staff at a particular location.

All existing IHS Government quarters units were counted. This total was reduced by the number of "poor" and "obsolete/substandard" units that were unfeasible to renovate. Other Government quarters units located 50 road miles or less from the health care facility were counted only to the extent they were available for occupancy by IHS staff.

The assumption is made that only 25 percent of the housing units from the local private-sector housing units in the core zone will be suitable, available, and affordable to non-local IHS staff. The assumption is made that only 10 percent of the housing units from the local private-sector housing units in the secondary zone will be suitable, available, and affordable to non-local IHS staff. **[NOTE to the planner: If the survey team considers an adjustment factor either too high or too low for a specific location, a more realistic factor shall be recommended and supported.]** The components which comprise this adjustment factor are as follows:

- *Suitability* - Not all housing units will be suitable to IHS staff because of the condition, size, or location of the units within a recognized community.
- *Availability* - Seasonal variations in the housing market and the relative supply and demand for housing influence the number of units that may be available.
- *Affordability* - This relates to the income relative to the cost of housing. It also pertains to the local real estate market; e.g., ability to sell or sublet, if transferred; rate of appreciation; interest rates; etc.

(NOTE to the planner: As applicable, provide wording to reflect the situation's conclusions.)

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Exhibit 4 Private Sector Housing Market

Exhibit 4					
HOUSING VERIFICATION SURVEY REPORT Private Sector Housing Market					
Area		Service Unit		Date	
COMMUNITY	AVERAGE DISTANCE FROM HEALTH CARE FACILITY (mi)	POPULATION	PROJECTED PRIVATE HOUSING UNITS AVAILABLE	ADJUSTMENT FACTOR	UNITS AVAILABLE FOR IHS NON-LOCAL STAFF
TOTAL HOUSING UNITS AVAILABLE FOR IHS NON-LOCAL STAFF					