Building Tennessee's Tomorrow:

Anticipating the State's Infrastructure Needs

July 2023 through June 2028

APPENDIX C: INVENTORY FORMS

Two separate inventory forms were used to collect data for the July 2023 through June 2028 Public Infrastructure Needs Inventory on which this report was based. The General Inventory Form is used to record information about the need for new or improved infrastructure, including new schools. The Existing Schools Inventory Form is used to record additional information about the conditions and facility needs at existing public schools from kindergarten through high school.

Survey forms from the United States General Accounting Office (GAO) provided the original model for the forms used in the first inventory of infrastructure needs in Tennessee during 1997. Since that time, the inventory form has been further customized to best meet the requirements of Chapter 1101, Public Acts of 1998, and Chapter 672, Public Acts of 2000 (see appendix A).

Staff from Tennessee's nine development districts use the inventory forms to gather information for the inventory from local government officials and agencies in each county. At a minimum, they include

- county executives,
- mayors,
- local planning commissions,
- local public building authorities,
- local education agencies,
- utility districts, and
- county road superintendents.

The Commission has tried to strike a balance between requiring sufficient information to satisfy the intent of the law and creating an impediment to local officials reporting their needs. By law, the inventory is required of the Commission, but it is not required of local officials. Local officials may decline to participate without penalty; similarly, they may provide only partial information, making comparisons across jurisdictions difficult. But with each annual inventory, participants have become more familiar with the process and more supportive of the program.

Extensive efforts are made to ensure that the information collected is accurate and meaningful. Development district staff work closely with local officials to make sure they are accurately capturing information. After development district staff enter information into the inventory database, there are extensive quality control programs run to make sure information is entered correctly and is internally consistent.

With each inventory, Commission staff assesses the potential for over or under-reporting by comparing reported needs to indicators of need, such as county size and population, and to factors related to the ability to fund infrastructure, such as taxable property and sales.

State of Tennessee
Tennessee Advisory Commission on Intergovernmental Relations
General Public Infrastructure Needs Inventory Form

Includes K-12 New School Construction & System-wide Needs

Include projects needed to be in some stage of development at any time between July 1, 2023, and June 30, 2043.
Record all information based on the project status as of July 1, 2023.
Each project must involve a cost of fifty thousand dollars ($50,000) or greater to be included in this inventory of needs.

Project Identification: *Number* _____ *(A numeric identifier auto generated by the system).*

1. **Project Name:** _____

10. **Is this project public infrastructure?** ❑ ***Yes or*** ❑ ***No***

2. **Project Description:** (do not repeat name or describe location; indicate size/scope if appropriate) _____

15. **Where is this project needed?** (Be as specific as possible (include latitude and longitude); do not repeat city/county.) _____

Bridge Number(s) _____

Notes: _____

3. **Is this a regional project** [i.e., serving users from more than one county]**?** ❑ ***Yes or*** ❑ ***No***

4. **County(ies):** _____
County or where the project is located.

5. **City(ies):** _____
City or cities in which this project is located. If outside a municipality, record as "**unincorporated**".

6. **Entity(ies) responsible for the project**: _____
Entity that will oversee the implementation of the project.

7. **Owner**: _____
Governmental entity that will hold legal title to the capital facility or land asset upon **completion** of the project. If leased, record lessee entity here and note in Question 19 that this project involves a lease.

8. **Owner's level of government:** ❑ City ❑ County ❑ State ❑ Federal ❑ Special District ❑ Joint (multiple levels) ❑ Other (public-private venture, etc.)

9. **Type of Project:**

List A (select no more than one)

- ❑ Business District Development
- ❑ Community Development
- ❑ Fire Protection
- ❑ Public Housing
- ❑ Industrial Sites & Parks
- ❑ K-12 New School Construction
  (select sub-type)
  - ❑ new school
- ❑ Law Enforcement
- ❑ School-system-wide Need
- ❑ Libraries, Museums & Historic Sites
- ❑ Other Education
- ❑ Other Facilities
- ❑ Post-secondary Education
- ❑ Public Buildings
- ❑ Public Health Facilities
- ❑ Recreation
- ❑ Solid Waste

List B (select no more than one)

- ❑ Other Utilities
- ❑ Broadband
- ❑ Storm Water
- ❑ Transportation (TDOT# if known _____)
  (select sub-type)
  - ❑ air ❑ bridge ❑ rail ❑ road ❑ ITS ❑ transit
  - ❑ navigation ❑ sidewalk ❑ signalization
  - ❑ other _____
- ❑ Water & Wastewater
  (select sub-type)
  - ❑ water supply ❑ wastewater ❑ both

11. **Is this project included in a capital improvement program (CIP)?** ❑ ***Yes or*** ❑ ***No***
CIP# (if known) _____

12. **School System** [if applicable] **Number:** _____
Name: _____

13. **What is the primary reason this project needed?** (If a combination, check all that apply.)

- ❑ Economic Development
- ❑ Community Enhancement
- ❑ Population Growth
- ❑ Public Health or Safety
- ❑ Federal Mandate (list applicable federal law) _____
- ❑ State Mandate (list applicable state law) _____
- ❑ Other _____

14. When is this project needed? Fiscal Year to Begin _____ **Fiscal Year to End**_____

16. Where is this project in relation to boundaries established pursuant to P.C. 1101?

- ❑ Within the existing city limits of an incorporated area
- ❑ Outside the existing city limits but inside the Urban Growth Boundary of an incorporated area
- ❑ In a Planned Growth Area established by the county
- ❑ In a Rural Area designated for the county
- ❑ Combination (check here and others that apply)
- ❑ Site location has not been determined—*this option is valid only for projects in the conceptual stage.*
- ❑ P.C. 1101 does not apply because this project is located entirely within the boundaries of a metropolitan government.

17. Is this project linked to other projects in the inventory? ❑ *Yes or* ❑ *No*

Projects are "linked" if two or more projects are required to achieve a functional result (e.g., a transportation project might be linked to an industrial site project or a utility project might be linked to a public building project, etc.).

If yes, how many other projects are linked to this one? _____

List the other linked projects by project number and by name:

Project Number (Supplied by the Inventory Contractor.)	**Project Name**

18a. What is the estimated cost of this project? $_____(Do not include cost of linked projects.)

18b. Are sufficient funds available to complete this project? ❑ *Yes or* ❑ *No*

18c. List available or potential dollars and funding sources (include all that apply)

Level of Government	**Available**	**Potential**	**Source**
City			
County			
Special District			
State			
Federal			
Other			

18d. If there are not sufficient funds to complete this needed project, how much additional funding will be needed? $_____

19. Does the cost of this project include a lease? ❑ *Yes or* ❑ *No* If yes, what is the annual cost? $_____
What is the term of the lease? Begin date: _____ End date: _____

20. Stage of project development as of July 1, 2023:

- ❑ **Conceptual:** has an estimated cost, but not yet in planning & design
- ❑ **Planning & Design:** has specific engineering or architectural drawings
- ❑ **Construction:** design plans are being executed

If the project was reported in a prior survey, you may need to mark the project stage as Completed or Canceled.

- ❑ **Completed:** construction or acquisition is concluded and the capital facility or land asset is available to provide the intended public benefit.
- ❑ **Canceled:** terminated at any stage from conceptual through design or construction

21. If this project is now complete, provide the total square footage and the final cost.

Size _____ Units _____ Final cost $_____ Fiscal Year Completed _____

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22. Respondent/Contact Person: _____
The person who provided the answers to this form.

23. Contact Person's Title: _____

24. Contact Entity: _____

25. Contact Person's Telephone Number: _____

26. Surveyor: _____
Contractor who interviewed respondent or otherwise gathered the data recorded in the inventory.

State of Tennessee
Tennessee Advisory Commission on Intergovernmental Relations
Existing School Facility Needs Inventory Form

Include projects needed to be in some stage of development at any time between July 1, 2023, and June 30, 2043.
Record all information based on the condition or project status as of July 1, 2023.

Each facility need at the school must involve a cost of fifty thousand dollars ($50,000) or greater to be included in this inventory.

A. SCHOOL IDENTIFICATION

A1. School Number: _____
A unique number identifying the school system & the school, assigned by the TN Dept. of Education.

A2. School System Name:
_____

A3. School Name (legal name of the school)**:**
_____

A4. Grades Served: _____

A5. School Status: _____
(i.e., Active, Inactive, Pending)
Status Begin Date: _____

A6. Inventory County: _____
The county in which this school campus is located.

B. CAMPUS CONDITION AND NEEDS

B1. Construction year of main campus building: _____ (Indicate the year of construction for the main building on campus.)

B2. Recent construction or renovations: (List each project that occurred within the last ten years if its cost was equal to or greater than $50,000. List projects by type [e.g., new school, classroom, science lab, auditorium, cafeteria, library and gym projects should be listed separately])

Project Code	Description	FY Completed	Sq. Footage	Final Cost
				$
				$
				$

B3. Will the school use leased space to meet its facility needs? ***Yes or No***___ If yes, list the annual cost: _____ What is the term of the lease? Begin date: _____ End date: _____

B4. Are any of this school's facilities used by another educational institution for educational purposes? ***Yes or No:*** _____ If "yes", list the shared facility, the institution with which it is shared and the reason for sharing.

Shared Facility	Sharing Institution	Reason
Example: Gymnasium	ABC Middle School	The middle school does not have a gym

B5. Does this school use another institution's facilities for programs or classes because of inadequate facilities? ***Yes or No:*** _____ If "yes", list the institution, the facility used, and the reason.

Program	Institution	Reason
Library research class	XYZ Middle School	Our school's library is inadequate.

Existing School Facility Needs Inventory Form

B6. Is there a plan to close this facility within the next five years? ***Yes or No:*** _____ If "yes", provide the date of closure in the table below.

Is there a plan to replace this facility? ***Yes or No:*** _____ If "yes", identify the replacement facility.

Date of Planned Closure	Name of the Replacement School	Project or Replacement School

B7. Is there a plan to change the function of this facility within the next five years? ***Yes or No:*** _____ If "yes", provide the date of change and identify the new function.

Date of Change	New Function

B8. List all technology infrastructure needs at this facility. Technology infrastructure includes capital assets such as electronic devices and computers. For purposes of this inventory, technology does not include application software (e.g., Adobe Reader, MS-Office) or telecommunication devices (e.g., telephones, radios). Technology infrastructure needs may be included regardless of cost. All other needs included in this inventory must involve a capital cost of not less than fifty thousand dollars ($50,000).

Technology Infrastructure Needs	Stage of Development	Estimated Cost
		$
		$
		$

B9. Does this school building need any modifications in order to comply with federal or state mandates (excluding the state EIA)? ***Yes or No:*** _____ If "yes", complete the following table. Federal and state mandates are rules, regulations, or laws adopted by the federal or state governments that require a building modification in order to achieve compliance. Record a mandate need only if the entire cost is the result of a mandate. Costs associated with the Education Improvement Act of 1992 (EIA) are captured only in ***Section C***; therefore, do not report EIA-related costs in this table. If there are other federal or state mandate needs not shown in the table, contact TACIR Staff.

Mandate	Description of Facility Modification Required	Stage of Development	Estimated Cost
Americans with Disabilities Act			$
Asbestos			$
Regulation of State Fire Marshal/Fire Codes			$
Individuals with Disabilities Education Act of 1990			$
Led-based paint Poisoning Prevention			$
Tennessee Petroleum Underground Storage Tanks Act			$

Existing School Facility Needs Inventory Form

FACILITY RATING SCALE:
Excellent: can be maintained in a "like new" condition and continually meet all building code and functional requirements with only minimal routine maintenance.
Good: does not meet the definition of "excellent", but the structural integrity is sound and the facility can meet building code and functional requirements with only routine or preventive maintenance or minor repairs that do not hinder its use.
Fair: structural integrity is sound, but the maintenance or repairs required to ensure that it meets building code or functional requirements hinder—but do not disrupt—the facility's use.
Poor: repairs required to keep the structural integrity sound or to ensure that it meets building code or functional requirements are costly and disrupt—or in the case of an individual component may prevent—the facility's use.

STAGE OF PROJECT: The current stage of development for a project recorded in the Public Infrastructure Needs Inventory should be recorded based on its status as of **July 1, 2023**, and it may be any one of the following:
Conceptual: identified as an infrastructure need with an estimated cost, but not yet in the process of being planned or designed.
Planning/Design: development of a set of specific drawings or activities necessary to complete a project identified as an infrastructure need.
Construction: actual execution of a plan or design developed to complete or acquire a project identified as an infrastructure need. *If the project was reported in a prior survey, you may need to report the project stage as Complete or Canceled if work is no longer active.*
Completed: construction or acquisition is concluded and the capital facility or land asset is available to provide the intended public benefit.
Canceled: terminated at any stage from conceptual through design or construction; eliminated from consideration for any reason other than completion; to be removed from the Public Infrastructure Needs Inventory.

B10. Using the facility rating scale provided above, list the number of facility components at this school by condition and estimate the cost to put all components in good condition. (Do not include costs recorded in previous sections or for EIA needs in section C.)

Component	Excellent	Good	Fair	Poor	Infrastructure needed to put fair or poor components in good condition			
					Number of Components by Type of Project	**Stage of development**	**Estimated Cost** *(must be ≥$50,000)*	**Square Footage**
Example: *Classrooms (Permanent)*	*2*	*10*	*6*	*2*	*6 to be upgraded*	*Conceptual*	*$100,000*	*3,000*
					2 to be replaced	*Plan & Design*	*$150,000*	*1,000*
Classrooms (Permanent)					___ to be upgraded		$	
					___ to be replaced		$	
Classrooms (Portable)					___ to be upgraded		$	
					___ to be replaced		$	
Specialized Science Classrooms					___ to be upgraded		$	
					___ to be replaced		$	
Specialized Music Classrooms					___ to be upgraded		$	
					___ to be replaced		$	
Specialized Vocational Classrooms					___ to be upgraded		$	
					___ to be replaced		$	

Existing School Facility Needs Inventory Form

Physical Ed. Facilities/ Gymnasium					__ to be upgraded		$	
					__ to be replaced		$	
Library/Media Center					__ to be upgraded		$	
					__ to be replaced		$	
Auditorium					__ to be upgraded		$	
					__ to be replaced		$	
Cafeteria					__ to be upgraded		$	
					__ to be replaced		$	
Administrative/Support Facilities					__ to be upgraded		$	
					__ to be replaced		$	

B11a. Rate the overall condition of the entire school. Consider the condition of the various components listed in question B10 and apply the definitions in the FACILITY RATING SCALE described there to the school as a whole.

❑ **Excellent** ❑ **Good** ❑ **Fair** ❑ **Poor**

B11b. Are there parts of this school not listed in item B10 that need to be upgraded or replaced (such as HVAC, roof, etc.) **because they are not in good condition based on the scale described in question B10?** ***Yes or No:*** If "yes", complete the following table. (Do not include needs reported in questions B8 through B10, B12 or Section C.)

Description	Replace or Upgrade	Stage of Development	Estimated Cost	Tag	Square Footage
Example: *Entire Roof in poor condition*	*Replace*	*Conceptual*	*$70,000*		
			$		
			$		

B12. Do any new components need to be added to this school in order to accommodate the educational needs of its students and teachers? ***Yes or No:*** _____ If "yes", complete the following table. (Do not include needs reported in items B8 through B11. List new component needed because of the Education Improvement Act in Section C.)

Reason for addition (select one)

Population growth
Program expansion or addition
Consolidation/Rezoning
Adding pre-k classrooms

Type of Component	Number	Reason for Addition	Stage of Development	Estimated Cost	Square Footage
Example: *Permanent Classrooms*	*6*	*Population growth*	*Conceptual*	*$100,000*	*3,000*
				$	
				$	
				$	

Existing School Facility Needs Inventory Form

C. EDUCATION IMPROVEMENT ACT OF 1992 (EIA) The EIA is a law enacted by the Tennessee General Assembly that, among other things, required smaller classes, and therefore more teachers, by the beginning of the 2022-23 school year. Record only EIA related costs here. Other costs related to facility condition (e.g., restrooms, libraries, etc.) should be reported in ***Section B***.

C1. As of July 1, 2023, does this facility have enough classrooms to accommodate the EIA class-size standards? *Yes or No* _____ If "yes", then skip to section D. If "no", continue.

C2. If there are not enough classrooms, then please explain how you will provide for the classroom needs of the teachers employed to meet the EIA requirement in school year 2023-24 (e.g., by using the stage in the gym as a classroom)**.** _____

_____

C3. How many additional classrooms will this school need to comply with the EIA in school year 2023-24? _____

C4. Estimate the cost for the additional classrooms (permanent or portable) necessary to comply with the EIA teacher-pupil ratio in school year 2023-24.

Type of Classrooms to be Added by Stage of Development	Number	Stage of Development	Estimated Cost	Square Footage
Example: *Permanent Classrooms*	*6*	*Planning and Design*	*$800,000*	*3,000*
			$	
			$	
			$	

D. RESPONDENT INFORMATION AND SURVEYOR IDENTIFICATION

D1. Respondent/Contact Person: _____
Person who provided the answers recorded on this form.

D2. Contact Title: _____

D3. Contact Organization: _____ **D4. Contact Phone Number:** _____

D5. Surveyor: _____
Development District Staff Person(s)/ Interviewer (i.e., Contractor who gathers the data recorded in the inventory).