

**DATA INVENTORY**

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**OPERATING STATEMENT (I&E)**

The Operating Statement (I&E) is designed to collect and analyze income and expense information on income producing properties. With this information, the appraiser is able to estimate value through capitalization of income. The Operating Statement is divided into four major categories: Market Data, Cost Data, Remodeling Data, and Income and Expense Data. The Income and Expense area of the statement is divided into three specialized areas: Apartments, General Commercial (retail, warehousing, industry), and Office Buildings. The purpose of the specific income and expense areas is to allow the property owner/manager space to enter applicable income, expense, and amenity data.

**MARKET DATA**

Space is provided to enter any sales information for both vacant and improved parcels. In addition, space is provided to enter the value of any personal property, inventories, or licenses that may have been included in the purchase price. Also, space is provided to enter the percent of mortgage, mortgage term, and interest rate.

**COST DATA**

Space is provided to enter any construction cost information that is available concerning the subject property. When possible, sizes of additions, paving, etc., should be entered under the comments area.

**REMODELING DATA**

Space is provided to enter the cost and a description of significant remodeling that has been associated with the building, the year of the remodeling, and whether the cost was attributable to the owner or a tenant.

**APARTMENTS - OPERATING STATEMENT**

Space is provided to enter a detailed current quoted rent per month by unit type. In instances where rents are computed on a square foot basis, space is provided to note the total apartment complex rentable area.

Project amenities and unit built-ins should be noted as to what is included/available in the apartment complex. The owner expense statement includes areas to enter what is paid by the owner and the costs associated for a two year period. The occupancy percentage should be entered in the space provided. Space is also provided to enter the number of garage/carport spaces available and the monthly rental charge, if applicable.

**GENERAL RETAIL, WAREHOUSING, INDUSTRIAL, OTHER- OPERATING STATEMENT**

This area is designed to enter income and expense amounts on general retail (retail sales), small industrial, and warehouse type facilities. Space is provided to enter the tenants, floor level, lease term, and floor area of the lease. Expenses are broken down into the general areas of insurance, taxes, maintenance, and utilities. Actual expense should be entered when available.

**OFFICE BUILDING - OPERATING STATEMENT**

This area of the operating statement is to enter the applicable income and expense information for office buildings. Space is provided to enter the building total gross area, net rentable area, and lease terms, i.e., on a total gross or net rentable area. The amount of retail area should be entered together with the current occupancy rate. The income statement is designed to quote rent per square foot, based on floor level and whether escalation of rental clause is included. The expense area is broken down into three major categories: insurance and taxes, building maintenance, and utilities. Actual expense should be entered by category if available.

Dear Property Owner:

As required by General Statute 105-286, Haywood County is conducting a Countywide Revaluation to become effective on January 1, 2011.

Revaluations are mandated in order to establish current and equitable values for assessment purposes. This is achieved through using the three approaches to value: cost, market and income. As an owner or manager of Commercial or Industrial property, you are aware that economic factors as well as physical aspects of the property have an effect upon its value. In order for our appraisers to establish a fair market appraisal of your property, we are asking you to please complete all information on the enclosed CONFIDENTIAL PROPERTY INFORMATION FORM that pertains to your property.

**The information you supply will be kept strictly confidential.  
Only the Revaluation staff will have access to this information.  
This is not a public records document.**

If this request does not fall under your jurisdiction, please forward this to the proper agent.

\*\*\* Please indicate by checking: \_\_\_ Owner occupied or \_\_\_ Tenant occupied. If leased, please indicate terms of lease agreement.

Please complete this form and return within 30 days. The form can be faxed to 828-456-7953 or mailed to Haywood County Assessors Office 215 N Main St Suite 220, Waynesville NC 28786. If you have any questions, please contact 828-452-6654.

Thank you for your assistance.

Judy H Ballard, Assessor  
Haywood County, North Carolina

# Haywood County 2011

# Schedule of Values

**CONFIDENTIAL PROPERTY INFORMATION FORM (Haywood County, North Carolina)**

**MARKET DATA:**  PURCHASED LAND ONLY *or*  PURCHASED LAND & BUILDING

**PURCHASE PRICE \$** \_\_\_\_\_ **PURCHASE DATE** \_\_\_\_\_

IF THE ABOVE PURCHASE PRICE INCLUDES ANY AMOUNT FOR ITEMS OTHER THAN REAL ESTATE (SUCH AS FURNITURE & FIXTURES, MACHINERY & EQUIPMENT) PLEASE LIST BELOW:

**NON-REAL ESTATE ITEMS:**

**AMOUNT: \$** \_\_\_\_\_

<b>COST DATA</b>	- ALL COSTS SHOULD INCLUDE: LABOR, MATERIALS, ARCHITECTURAL FEES, CONTRACTORS OVERHEAD AND PROFIT. - BUILDING COST SHOULD INCLUDE ALL MECHANICAL FEATURES (PLUMBING, HEATING, AIR CONDITIONING, ETC.) AS WELL AS THE STRUCTURE ITSELF.				
	<b>COST</b>	<b>YEAR</b>	<b>COST</b>	<b>YEAR</b>	<b>COMMENTS</b>
SITE (LAND)					
IMPROVEMENTS					
BUILDINGS					
ADDITIONS TO ORIGINAL BLDG					
PAVING					
OTHER YARD ITEMS					
<b>TOTAL</b>					

<b>REMODELING DATA</b>	PLEASE EXPLAIN WHAT PART OF BUILDING WAS REMODELED -- INDICATING COST AND YEAR
REMODELING COST PAID BY <input type="checkbox"/> OWNER <input type="checkbox"/> TENANT	

<b>LEASE OR RENTAL DATA</b>		PLEASE INDICATE TERMS OF MAJOR LEASE AGREEMENTS. GIVE DATE OF EXPIRATION, RENEWAL OPTIONS, AMOUNT OF RENT AND OTHER PERTINENT DATA. IF LEASE GUARANTEES A MINIMUM RENTAL, PLUS A PERCENTAGE, PLEASE INDICATE MINIMUM RENT, AND THE OVERAGE ACTUALLY PAID FOR EACH OF THE PAST THREE YEARS.				<b>LAND LEASE DATA</b>	TERMS _____ AMT. \$ _____
TENANTS	LENGTH OF LEASE	YEAR EXPIRES	GUARANTEED RENTAL	OVERAGE TERMS	AVG. ANNUAL RENT (LAST 3 YRS)	RENEWAL AND/OR PURCHASE TERMS	RENEWAL RATE

# Haywood County 2011

# Schedule of Values

GROSS ANNUAL INCOME				ANNUAL EXPENSES			
COMMERCIAL BUILDINGS FOR _____				ANALYSIS _____			
	OFFICE			GENERAL	LEGAL & ACCTNG.		
	WAREHOUSE				PAYROLL TAXES		
	PARKING				GROUP INSURANCE		
UPPER FLOOR	RETAIL				BLDG SUPPLIES		
	OFFICE				RUBBISH REMOVAL		
	APARTMENT				MISCELLANEOUS		
	WAREHOUSE				CLEANING	WAGES	
PARKING			SUPPLIES				
OTHER	REIMBURSED OPER. EXPENSE				CONTRACT SERV.		
	MISCELLANEOUS				UTILITIES	ELECTRIC	
TOTAL			HEATING				
APARTMENT BUILDINGS FOR _____				WATER			
				AIR CONDITIONING			
TYPE	#	\$ Per Month	ITEMS NORMALLY FURNISHED	ELEVATOR	WAGES & UNIF.		
Efficiency Units	_____ @ _____	_____ @ _____	<input type="checkbox"/> HEATING <input type="checkbox"/> AIR CONDITIONING <input type="checkbox"/> ELECTRIC <input type="checkbox"/> WATER <input type="checkbox"/> RANGE <input type="checkbox"/> REFRIGERATOR <input type="checkbox"/> DISHWASHER <input type="checkbox"/> DISPOSAL <input type="checkbox"/> CARPETS <input type="checkbox"/> DRAPES <input type="checkbox"/> FURNITURE <input type="checkbox"/> _____		REPAIR & SERVICE		
1 Bedroom Units	_____ @ _____	_____ @ _____	PROJECTED ANNUAL INCOME \$ _____  ACTUAL ANNUAL VACANCY & CREDIT LOSSES \$ _____  ACTUAL ANNUAL INCOME \$ _____	CONSTRUCTION	DECORATING		
2 Bedroom Units	_____ @ _____	_____ @ _____			INSURANCE		
3 Bedroom Units	_____ @ _____	_____ @ _____		REAL EST. TAXES			
	_____ @ _____	_____ @ _____		OTHER TAXES			
	_____ @ _____	_____ @ _____		DEPRECIATION			
MANAGER/JANITOR	_____ @ _____	_____ @ _____		FIXED EXPENSE	INTEREST		
GARAGE/CARPORT	_____ @ _____	_____ @ _____			LAND RENT		
OTHER INCOME	_____ @ _____	_____ @ _____			TOTAL		

THIS FORM IS **STRICTLY CONFIDENTIAL**. TO BE USED AND RETAINED ONLY BY HAYWOOD COUNTY APPRAISERS. IT WILL NOT BE FILED WITH THE PROPERTY RECORDS. SHOULD YOU REQUIRE FURTHER EXPLANATION OR ASSISTANCE IN COMPLETING THIS DOCUMENT PLEASE CONTACT THE APPRAISAL OFFICE AT (828-452-6654).

SUBMITTED BY \_\_\_\_\_ TITLE \_\_\_\_\_ TELEPHONE \_\_\_\_\_

THIS SPACE FOR APPRAISERS' USE ONLY		
POTENTIAL GROSS INCOME		NOTES:
LESS VACANCY AND CREDIT LOSS		
EFFECTIVE GROSS INCOME		
LESS OPERATING EXPENSES		
LESS RESERVES FOR REPLACEMENTS		
NET INCOME BEFORE CAPITAL RECAPTURE		
IMPUTABLE TO LAND _____ X _____%		
IMPUTABLE TO BLDG. _____ X _____%		
RESIDUAL LAND/BLDG _____ X _____%		
INDICATED PROP VAL _____		
APPRAISED VALUE _____		

**HAYWOOD COUNTY REAPPRAISAL GOLF COURSE QUESTIONNAIRE**

Course Name \_\_\_\_\_ Architect \_\_\_\_\_

Number of Holes \_\_\_\_\_ Par/Course Rating \_\_\_\_\_

USGA Slope Rating:

Championship \_\_\_\_\_ Intermediate \_\_\_\_\_ Senior/Ladies \_\_\_\_\_

Number of Acres Utilized by Golf Course: \_\_\_\_\_

Irrigation System: Greens \_\_\_\_\_ Fairways \_\_\_\_\_ Both \_\_\_\_\_

Actual Year Built \_\_\_\_\_ Cost Per Hole \_\_\_\_\_

Year of Major Renovations \_\_\_\_\_

\_\_\_\_\_

Number of Anticipated Annual Rounds \_\_\_\_\_

Number of Actual Annual Rounds \_\_\_\_\_

Public/Guest Rates:

18 Holes Weekday – Seasonal \_\_\_\_\_

18 Holes Weekend/Holidays – Seasonal \_\_\_\_\_

Special Rates:

18 Holes Senior/Junior \_\_\_\_\_

18 Holes Twilight \_\_\_\_\_

18 Holes Off Season \_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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**HAYWOOD COUNTY REAPPRAISAL GOLF COURSE RATING FORM**

Course Name \_\_\_\_\_

Number of Holes \_\_\_\_\_ Acres \_\_\_\_\_ Length \_\_\_\_\_ (yds)

Par/Course Rating \_\_\_\_\_ Zoning \_\_\_\_\_ Age \_\_\_\_\_

Annual Rounds Played This Year (anticipated) \_\_\_\_\_ Last Year \_\_\_\_\_

USGA Slope Rating \_\_\_\_\_ (Attach Scorecard)

Irrigation: Fairways \_\_\_\_\_ Greens \_\_\_\_\_ Both \_\_\_\_\_

List of Amenities: (please check)

- |                             |                             |
|-----------------------------|-----------------------------|
| Practice Green _____        | Driving Range _____         |
| Lockers _____               | Practice Sand Trap(s) _____ |
| Restaurant _____            | Bag Storage _____           |
| Bar/Lounge _____            | Snack Bar _____             |
| Rain Shelters _____         | Golf Carts _____            |
| Restrooms (on course) _____ | Snack Bar (on course) _____ |
| Swimming Pool _____         | Tennis Courts _____         |
| Other (list items) _____    |                             |

Course Rating: Excellent = 5; Good = 4; Average = 3; Fair = 2; Poor = 1

- |                            |                           |
|----------------------------|---------------------------|
| Greens/Fairways _____      | Clubhouse/Pro Shop _____  |
| Tees/Range/Hazards _____   | Trees/Scenic Beauty _____ |
| Layout Design _____        | Practice Facilities _____ |
| Food/Bev. Facilities _____ | Other Amenities _____     |
| Social Atmosphere _____    | Course Image _____        |
| Architect _____            | Total Points _____        |

Note: A score over 50 is excellent; 40-49 points is good; 30-39 points is average; 15-29 points is fair; and 14 points & under is poor.

Course Prices:

9-Hole Weekday \$ \_\_\_\_\_ 9-Hole Weekend \$ \_\_\_\_\_ 18-Hole Weekday \$ \_\_\_\_\_  
 18-Hole Weekend \$ \_\_\_\_\_ Golf Cart/9-Hole \$ \_\_\_\_\_ 18-Hole \_\_\_\_\_  
 Special Rates-Senior \$ \_\_\_\_\_ Junior \$ \_\_\_\_\_ Twilight \$ \_\_\_\_\_

Date of Rating: \_\_\_\_\_

Name of Analyst: \_\_\_\_\_

**HAYWOOD COUNTY GENERAL REAPPRAISAL  
MOBILE HOME/RV PARK QUESTIONNAIRE**

Park Name: \_\_\_\_\_

Physical Location: \_\_\_\_\_

Park Owner: \_\_\_\_\_ Address: \_\_\_\_\_

Phone Number (Home) \_\_\_\_\_ (Business/Cell) \_\_\_\_\_

Total Number of Rentable Mobile Home Spaces: \_\_\_\_\_

Total Number of Rentable R/V or Camper Spaces: \_\_\_\_\_

Average Number of Vacant Spaces: Monthly: \_\_\_\_\_ Annually: \_\_\_\_\_

Rent per Mobile Home Space: \_\_\_\_\_ Month \_\_\_\_\_ Week \_\_\_\_\_ Annual

Rent per R/V or Camper Space: \_\_\_\_\_ Month \_\_\_\_\_ Week \_\_\_\_\_ Annual

Does Rent Include Any of the Following? (Check if Applicable)

**Maintenance**

**Water and Sewer**

**Trash Pickup**

Lawn Maintenance: \_\_\_\_

Well and Septic \_\_\_\_

Included: \_\_\_\_

Street Maintenance: \_\_\_\_

City Water & Sewer \_\_\_\_

Not Included: \_\_\_\_

Private Water & Sewer: \_\_\_\_

Other Considerations (Please Explain)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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**HAYWOOD COUNTY CEMETERY QUESTIONNAIRE**

Cemetery Name \_\_\_\_\_

Cemetery Address \_\_\_\_\_

1) How many grave sites remained unsold as of January 1, 2011? \_\_\_\_\_

2) How many grave sites were sold during 2010? \_\_\_\_\_

3) Total gross income received from the sale of grave sites during 2010. \_\_\_\_\_

4) What is the average price of the remaining unsold grave sites? \_\_\_\_\_

5) How many crypt sites remained unsold as of January 1, 2011? \_\_\_\_\_

6) How many crypt sites were sold during 2010? \_\_\_\_\_

7) Total gross income received from the sale of crypt sites during 2010. \_\_\_\_\_

8) What is the average price of the remaining unsold crypt sites? \_\_\_\_\_

9) How many niche sites remained unsold as of January 1, 2011? \_\_\_\_\_

10) How many niche sites were sold during 2010? \_\_\_\_\_

11) Total gross income received from the sale of niche sites during 2010. \_\_\_\_\_

12) What is the average price of the remaining unsold niche sites? \_\_\_\_\_

13) Were any grave sites, crypt sites, niche sites or mausoleums added during 2010? yes \_\_\_ no \_\_\_

14) Have you purchased or sold any cemetery land or made any other improvements during 2010? yes \_\_\_ no \_\_\_ if yes list type, amount and cost.

15) Has the property been appraised for any reason; sale, bankruptcy, merger, etc. since 2006? yes \_\_\_ no \_\_\_ if yes please provide copy of appraisal, etc.

Submitted by \_\_\_\_\_

Owner Name(s) \_\_\_\_\_

Telephone \_\_\_\_\_

Parcel Number \_\_\_\_\_

Date \_\_\_\_\_

**HAYWOOD COUNTY, NORTH CAROLINA NEIGHBORHOOD ID 05R002  
NEIGHBORHOOD DATA FORM 2011**

**Area Name** SMATHERS ST

**Predominant Use** RES\_X\_\_ AGR\_\_ COM\_\_ IND\_\_ OTHER\_\_ MIXED\_\_

**Typical CDU** EX\_\_ VG\_\_ GD\_\_ AV\_X\_\_ FR\_\_ PR\_\_ VP\_\_

**Typical Grade** AAA\_\_ AA\_\_ B\_\_ C\_X\_\_ D\_\_ E\_\_ (+ - )\_\_

**Utilities** All Public\_X\_\_ Public Water\_\_ Public Sewer\_\_ Well\_\_ Septic\_\_

**Street/Road** Paved\_X\_\_ Semi Improved\_\_ State Maintained Gravel\_\_ Private\_\_







VALUATION CYCLE

