**DEPARTMENT OF THE NAVY**
**HEADQUARTERS UNITED STATES MARINE CORPS**
**WASHINGTON, DC 20380-0001**

MCO P11000.22
LFF-3
14 Feb 91

MARINE CORPS ORDER P11000.22 W/CH 1,2

From: Commandant of the Marine Corps
To: Distribution List

Subj: MARINE CORPS HOUSING MANAGEMENT MANUAL

Encl: (1) LOCATOR SHEET

Reports Required: List, page v

1. Purpose. To promulgate policies and procedures for managing and administering Marine Corps Housing.

2. Cancellations. MCO P11000.15A, MCO P11000.18A, MCO 11101.51G, MCO 11100.6, MCO 11101.60, and MCO 11101.61.

3. Background. This Manual provides policy guidance for the acquisition, utilization and disposition of Marine Corps housing. It sets policy and procedures for operating housing referral services to assist eligible personnel to locate adequate, nondiscriminatory off-base housing; it outlines procedures for preparing reports and it provides the policy for operating and maintaining Marine Corps housing. This Manual defines Government and occupant responsibilities and criteria for conducting requirements determination for family and bachelor housing.

4. Recommendations. Recommendations concerning the contents of the Housing Management Manual are invited and should be submitted to the Commandant of the Marine Corps (CMC) (LFF) via the appropriate chain of command.

5. Reserve Applicability. This Manual is not applicable to the Marine Corps Reserve.

6. Certification. Reviewed and approved this date.

R. J. WINGLASS
Deputy Chief of Staff
for Installations and Logistics

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**DEPARTMENT OF THE NAVY**
**HEADQUARTERS UNITED STATES MARINE CORPS**
**WASHINGTON, DC 20380-0001**

LFF-3
10 Feb 92

MARINE CORPS ORDER P11000.22 Ch 1

From: Commandant of the Marine Corps
To: Distribution List

Subj: MARINE CORPS HOUSING MANAGEMENT MANUAL

Encl: New page inserts to MCO P11000.22

1. Purpose. To transmit new page inserts to the basic Manual.

2. Action

a. Remove pages 2-3 and 2-4 of the basic Manual and replace with corresponding pages contained in the enclosure.

b. Insert new section 8 of chapter 2 to the basic Manual.

3. Summary of Chances. To clarify any misconceptions/questions regarding billeting funds for transient quarters.

4. Chance Notation. Significant changes in the reviewed pages for this Change are denoted by an arrow ( ➡ ) symbol.

5. Filing Instructions. This Change Transmittal will be filed immediately following the signature page of the basic Manual.

R. J. WINGLASS
Deputy Chief of Staff
for Installations and Logistics

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SUBJ/MCO P11000.22 CH 2. MARINE CORPS FAMILY HOUSING ASSIGNMENT POLICY//
REF/A/GENADMIN/MARBKS SUBIC BAY RP/180507ZFEB92//
NARR/REF A REQUESTED GUIDANCE CONCERNING ENTITLEMENTS FOR DEPENDENTS DEPARTING PHILIPPINES PRIOR TO SPONSOR.//
RMKS/1. THIS CHANGE IS APPLICABLE TO MARINE CORPS ACTIVITIES ON PCN 102 058600 00 DISTRIBUTION.
2. REF A IDENTIFIED A SITUATION WHEREBY DEPENDENT ARE ORDERED TO DEPART CURRENT DUTY STATION ON PCS ORDERS PRIOR TO THE SPONSOR'S DETACHMENT DATE. THE CONCERN WAS HOW THIS IMPACT ON THEIR ABILITY TO APPLY FOR BASE HOUSING AT THE NEW PERMANENT DUTY STATION.
3. TO ADDRESS THIS SITUATION, POLICY CONTAINED IN PARAGRAPH 1209 OF THIS MANUAL IS MODIFIED AS FOLLOWS:
P. A. ERHARD, LFF-3, 6-0860 PCN 10211301902

R.J.WINGLASS,LTGEN,L,61028

A. DEPENDENTS REQUIRED TO DEPART CURRENT OVERSEAS DUTY STATION ON PCS ORDERS PRIOR TO DETACHMENT OF SPONSOR MAY APPLY FOR HOUSING IF THEY ARE IN POSSESSION ON THE SPONSOR'S ORDERS AND A POWER OF ATTORNEY. IF THEIR NAME COMES UP ON THE WAITING LIST PRIOR TO ARRIVAL OF THE SPONSOR, THEY MAY BE ASSIGNED TO HOUSING.

B. THE CONTROL DATE FOR THIS PURPOSE WILL BE ESTABLISHED AS THE DATE OF TERMINATION FOR GOVERNMENT QUARTERS AT THE PREVIOUS DUTY STATION. FOR THOSE FAMILIES WHO DO NOT RESIDE IN GOVERNMENT QUARTERS AT THE OVERSEAS DUTY STATION, THE CONTROL DATE WILL BE THEIR PORT CALL DATE.

4. POINT ON CONTACT FOR THIS HEADQUARTERS IS MR. PAUL ERHAED, DSN 226-0860.//

P. A. ERHARD, LFF-3, 6-0860 PCN 10211301902

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# LOCATOR SHEET

Subj: MARINE CORPS HOUSING MANAGEMENT MANUAL

Location:_____
(Indicate the location(s) of the copy(ies) of this Manual.)

ENCLOSURE (1)

# RECORD OF CHANGES

Log completed change action as indicated.

| Change Number | Date of Change | Date Entered | Signature of Person Incorporated Change |
|---|---|---|---|
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## REPORTS REQUIRED

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| I. | Family Housing Inventory Occupancy Report (DD Form 1410) | DN-11101-26 (External DD-P&L(A)1081) | 1202.2d/ 1202.3/ Appendix C |
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| V. | Bachelor Housing Requirements Estimate | EXEMPT | 2100/ Appendix L |
| VI. | General and Flag Officer Quarters Management Report (DD Form 2405) | DD-11103-02 (External DD-P&L(A) 1706) | 3202/ Appendix O |
| VII. | Family Housing Inventory Designation and Assignment Report (DD Form 1411) | DD-11101-27 (External DD-P&L(A) 1082) | Appendix C |

# INTRODUCTION

0001. PURPOSE. To promulgate policies and procedures for managing and administering Marine Corps Housing.

0002. STATUS

1. The policies and procedures in this Manual apply to all Marine Corps Installation Commanders who have management responsibility for Bachelor Housing, Family Housing or General Officers' Quarters.

2. The Manual contains guidance, information and procedures for Marine Corps Housing Management. Certain Marine Corps Orders and Bulletins are canceled by this Manual. Each former order/bulletin forms the basis of sections which are found in the new Manual. Portions of the Manual have been developed so as to be able to be extracted from the Manual to act as a stand alone order.

0003. SCOPE. This Manual provides policy guidance for the acquisition, utilization and disposition of Marine Corps housing. It sets policy and procedures for operating housing referral services to assist eligible personnel to locate adequate, nondiscriminatory off-base housing; it outlines procedures for preparing required reports and it provides the policy for operating and maintaining Marine Corps housing. This Manual defines government and occupant responsibilities and criteria for conducting requirements determination for family and bachelor\housing.

0004. RESPONSIBILITY. The Commandant of the Marine Corps (LFF) is responsible for the accuracy, currency, modification, and distribution of this Manual. HQMC staffs and field commanders are responsible for the timely entry of changes and the physical maintenance of copies of this Manual.

0005. ALLOWANCES

1. Submit requests for changes in allowances of this Manual to the Commandant of the Marine Corps (AR). Submit requests per MCO P5600.31, Marine Corps Publications and Printing Regulations.

2. Request missing pages by requisitioning the basic Manual or pertinent changes per MCO P5600.31.

0006. ORGANIZATION

1. This Manual is organized into chapters identified by an Arabic numeral as listed in the overall contents.

2. Paragraph numbering is based on four digits. The first digit indicates the chapter; the next digit, the section, the final two digits the general major paragraph number; and the combinations which follow the decimal point, the subparagraph number; e.g., 3101.3a(2) refers to chapter 3, section l, general major paragraph number 01; subparagraph 3a(2).

3. Pages are numbered in separate series by chapter number, with-the chapter number preceding each page number: e.g., the fourth page of chapter 2 is shown as 2-4.

0007. CHANGES. Printed changes are posted by following the instructions in the Marine Corps Directives System Manual. Interfile changes in the basic Manual in consecutive order and complete the Record of Changes page.

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# CHAPTER 1

# FAMILY HOUSING MANAGEMENT


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# CHAPTER 1

## FAMILY HOUSING MANAGEMENT

1000. THE MILITARY FAMILY HOUSING PROGRAM. The policy of the U.S. Government is to rely on private community assets as the primary means for housing military families. This policy applies to both the continental United States and overseas. Construction programs are developed to offset existing and projected shortages. Construction programs are based on requirements for eligible military personnel who receive the basic allowance for quarters (BAQ) at the "with dependents' rate, and key or essential (eligible) civilian employees. New houses are programmed and constructed to satisfy deficiencies in specific categories. All family housing under the jurisdiction or assignment control of the Marine Corps is assigned to eligible personnel without regard to race, color, religion, sex, or national origin.

1001. PURPOSE. This Manual provides instructions and information on Marine Corps policy for the management, planning, utilization, maintenance, operation, and disposition of military family housing facilities at all Marine Corps installations under the command of the CMC.

1002. APPLICABILITY. This Manual is the source of information and guidance to promote and ensure uniform and coordinated management of all Marine Corps family housing facilities and programs. The provisions of this Manual are to be used as guidance in managing Marine Corps family housing facilities and programs. The installation commander may deviate from these provisions if necessary to react to local conditions. All correspondence, to include reports requested herein, shall be addressed to the CMC (LFF), Headquarters Marine Corps, Washington, DC 20380. This Manual will be the primary managerial guides for Marine Corps installations having military family housing responsibilities.

1003. AUTHORITY. The CMC derives general authority for family housing facilities and programs from DoD and Department of the Navy Regulations. Specific authority is derived from law and from delegation made by the Secretaries of Defense and Navy.

1004. POLICY ON PROVIDING FAMILY HOUSING

1. Objectives. The objective of the family housing program is to ensure that service members with accompanying dependents have adequate housing in which to shelter their families. The critical item is accompanying dependents; service members may be married or unmarried, divorced, separated, or widowed. The local communities shall be relied on as the primary source of family housing for military personnel.

a. Government-owned housing will not be programmed for construction (unless military personnel must live on a Government installation for reasons of military necessity) when the community has the capacity to provide satisfactory rental housing for military personnel.

b. Government-owned housing will be programmed for construction to meet valid requirements when little or no community housing is available, or when community housing is available but the location, quality, or cost create a distinct hardship for military families. All reasonable precautions will be taken to preclude overbuilding and to avoid harmful economic impact on local housing markets.

c. No Government housing will be built in the United States, unless a valid need has been justified per established criteria. Although houses which have been purchased by free choice of the military occupant and certain other houses occupied by military owners are considered in determining the military need, vacant "for sale" housing will not generally be considered in making this determination.

2. Policy. For the purpose of advancing the missions assigned to the Marine Corps by higher authority and by law, the Marine Corps provides and maintains, or participates in the provision and maintenance of adequate and inadequate housing for Marine Corps military and certain key and essential civilian personnel per the preceding.

3. Right to Housing. The Marine Corps recognizes no inherent right to Government housing for any group or individual.

1005. BAQ AND VARIABLE HOUSING ALLOWANCE (VHA) TERMINATION AND REINSTATEMENT. BAQ and VHA are monetary allowances a service member receives to offset the cost of housing when quarters are not provided by the Government.

1. Termination of BAQ/VHA Entitlement. The effective date for termination of BAQ/VHA is at 2400 hours on the day before the day that Government quarters are assigned. BAQ/VHA will not be terminated when a member cannot occupy family housing on the date scheduled because of delays incident to competent orders. For instance, BAQ continues until household goods are available for the dependents if the delay in arrival of household goods is due to circumstances beyond the member’s control.

2. Reinstatement of BAQ. BAQ will be reinstated on the date of termination of assignment to Government quarters, unless dependents continue to occupy the quarters, in which case BAQ will start when the dependents physically depart the quarters pursuant to the sponsor’s permanent change of station (PCS) orders.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 1: FAMILY HOUSING ORGANIZATION, RESPONSIBILITIES, AND FUNCTIONS

### PART A: ORGANIZATION

1100. GENERAL INFORMATION. The administration of family housing as authorized by the Congress, extends from the Office of the Secretary of Defense (OSD) through the Secretary of the Navy and the CMC to the installation commander. Items 1-7 below, contain a brief description of each of the echelons.

1. Congress. Congress authorizes the existence of the family housing programs, legislates broad guidelines for the conduct of the program, and appropriates the funds to be used in the execution of the program.

2. Secretary of Defense. The Secretary of Defense is the program sponsor to the Congress for military family housing for all of the military departments and DoD agencies. The Assistant Secretary of Defense (ASD) exercises direction through the Deputy Assistant Secretary of Defense (DASD).

3. Secretary of the Navy. The Secretary of the Navy is responsible, under the direction, authority, and control of the Secretary of Defense, for implementation of the family housing policies and programs within the DON. Within the Secretariat, the Assistant Secretary of the Navy for Installations and Environment is responsible for family housing.

4. The CMC. The CMC, as the program sponsor and coordinator, recommends legislation and acquisition programs; establishes policies for designation, assignment, activation, disposal, and housing referral; and assigns responsibilities for the administration of facilities and programs.

5. Installation Commanders. Installations are the onsite managers of the family housing program, maintaining and using the assets on the Family Housing Property Account in compliance with current policies and instruction.

6. Naval Facilities Engineering Command (NAVFACENGCOM). The NAVFACENGCOM is the construction agent for the DON, and assists the Marine Corps in design, acquisition, and construction.

7. Engineering Field Divisions (EFD). The EFD’s assist the Marine Corps installations by providing technical, contractual, and design guidance.

1101. INSTALLATION FAMILY HOUSING ORGANIZATION. Each Marine Corps installation having family housing assets will have a family housing office headed by a housing manager who will be responsible for the centralized management of all aspects of family housing, including housing referral services. Family housing organizations will be staffed and operated by permanently assigned civilian personnel. Military personnel may be used in the family housing office at the discretion of the local commander to augment or assist; however, they will not

replace civilian personnel. The organizational set-up and staffing at the installation should be established to best provide the services required to operate and maintain the family housing assets.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 1: FAMILY HOUSING ORGANIZATION, RESPONSIBILITIES, AND FUNCTIONS

### PART B: RESPONSIBILITIES

1102. THE COMMANDANT OF THE MARINE CORPS. The CMC will:

1. Advise the Assistant Secretary of the Navy On matters concerning family housing.

2. Act as program sponsor, budget installation sponsor, and program coordinator.

3. Provide manpower plans and projected personnel strengths to commanding officers, area coordinators, and others concerned with determining requirements for construction, leasing, or other acquisition.

4. Establish policies for the use, designation, assignment, activation, inactivation, and disposal of family housing.

5. Determine proposed on-base sites when agreement cannot be reached by technical authorities within the command chain of an installation.

6. Coordinate, and establish functions for housing referral services.

7. Assign responsibilities, as necessary, for administering facilities and programs.

8. Forward Marine Corps programs and projects for construction, leasing, or other acquisition (to meet Marine Corps requirements) for submission to the Assistant Secretary of the Navy for inclusion in the total Department of the Navy Family Housing Acquisition Program.

9. Develop and justify the Marine Corps Six-Year Defense Plan and annual budget requirements for family housing.

10. Fund, manage, maintain, and operate family housing at all Marine Corps installations. The CMC furnishes such information and reports as required to maintain a complete, comparative, and integrated Department of the Navy (DON) system of property records and accountability for family housing operations.

1103. THE COMMANDER. MARINE CORPS BASES (MCB), PACIFIC. The Commander, MCB, Pacific shall:

1. Act as the principal CMC representative at all functions pertaining to Marine Corps family housing under the cognizance of the Commander, MCB’s, Pacific. This housing includes that which is under the cognizance of the installation commander at Marine Corps Air Station (MCAS), Iwakuni, Japan.

2. Establish and promulgate organizational functions and procedures and conduct inspections, as necessary, to properly administer the family housing program.

3. Advise the CMC On all housing matters of command concern and submit recommendations for changes or exceptiOns to policy and to terminate exceptions granted where conditions are no longer valid.

4. Control, coordinate, and recommend necessary changes, concerning submission of budgetary requirements and the execution of funds allocated under the Family Housing, Navy, and Marine Corps (FH,N&MC) appropriation.

5. Consolidate and establish priorities on all family housing programs. The Commander, MCB's, Pacific, has been provided a housing director to assist in administering the family housing functions.

1104. THE COMMANDERS. MARINE CORPS AIR BASES (MCAB) (EASTERN AND WESTERN AREAS) (COMCABEAST AND COMCABWEST) AND MARINE CORPS LOGISTICS BASES (MCLB). The COMCABEAST, COMCABWEST, and MCLB's shall:

1. Provide necessary control, coordination, and recommendations regarding submission of budgetary requirements and the execution of funds allocated under the FH,N&MC appropriation for air installations under this cognizance.

2. Consolidate and establish priorities on all family housing programs under their purview.

1105. THE INSTALLATION COMMANDER SHALL. The installation commander shall:

1. Provide attractive living conditions for all military personnel and their families.

2. Provide housing referral service to help DoD personnel and their dependents locate acceptable, affordable, and nondiscriminatory housing in the local community, and to provide an orientation to the local community.

3. Provide housing statistics for on-base and off-base housing availability to the nearest Relocation Assistance Center as needed to update the automated Relocation Assistance Program which is interactive with all DoD Relocation Assistance Centers worldwide.

4. Ensure that maintenance contracts allow for self-help work performed by housing occupants.

5. Operate, maintain, repair, and improve Marine Corps housing.

6. Ensure occupants move into clean housing.

7. Ensure that accessible housing is available upon assignment to persons with special health or physical disability requirements.

8. Ensure the family housing office is staffed appropriately to perform the level of services necessary tO provide military members and their families adequate and affordable temporary and permanent housing in the community or on base.

# FAMILY HOUSING MANAGEMENT

## SECTION 1: FAMILY HOUSING ORGANIZATION, RESPONSIBILITIES, AND FUNCTIONS

### PART C: FAMILY HOUSING OFFICE

Iii

1106. FUNCTIONS. The responsibilities of a family housing office should include but not be limited to:

1. Preparation and analysis of family housing surveys, management reports, and studies.

2. Planning and programming for acquisition and improvement of family housing.

3. Planning, programming, and budgeting for operation, maintenance, repair, and improvement of family housing.

4. Acquisition, disposition, and diversion of family housing facilities.

5. Execution of the family housing program authorized and appropriated by Congress and allocated by the CMC.

6. Assignment and termination of quarters.

7. Promotion of occupant relations.

8. Implementation of a family housing self-help program.

9. Implementation of housing referral services per section 5 of this chapter.

10. Implementation of rental charges.

11. Location and inspection of leased housing.

12. Control of issue, repair, and procurement of furnishings (including appliances). See appendix B.

13. Establishment and maintenance of facilities history.

14. Developing and executing maintenance plans (short and long-term) for family housing facilities.

# FAMILY HOUSING MANAGEMENT

## SECTION 2: FAMILY HOUSING DESIGNATION, APPLICATION, ASSIGNMENT, OCCUPANCY, AND TERMINATION

### PART A: POLICY

1200. INFORMATION

1. Policies and procedures governing Marine Corps family housing assignment, occupancy, and termination are applicable to the Marine Corps without regard to geographic location. The Marine Corps manages the family housing assets on its plant accounts per guidelines established by the DoD and the Secretary of the Navy. The principle objective of the Marine Corps Family Housing Program is to ensure that Marines with dependents are suitably housed. To achieve this, it is DoD policy to rely on the local civilian housing market in communities near military installations as the primary source of housing for military families. A BAQ is paid to eligible members to help defray the costs of obtaining civilian housing where adequate military family housing quarters are not assigned. A VHA is paid to eligible members in areas in the CONUS. A similar allowance is paid in overseas areas where the cost of housing exceeds BAQ. Military family housing is constructed only in those locations where the civilian housing market cannot meet the needs of the local military community, and then only with Secretary of Defense approval and Congressional appropriation. Assignment procedures and utilization criteria are derived from DoD policy to provide an opportunity for occupancy by the greatest number of eligible personnel.

2. All military members with dependents must report to the housing referral office at their new installation prior to making living arrangements to reside in the civilian community. When issuing or endorsing PCS orders of personnel being transferred, the installation commander shall include the following statement on the orders:

"Before making any rental or lease agreement or purchasing a home, you shall report to the local housing referral office which has the responsibility for providing housing referral services to the installation to which you are assigned."

## PART B: DESIGNATION

1201. GENERAL INFORMATION. "Designation" is the classification of family housing into the categories of adequate public quarters or inadequate Government-owned quarters. That which is classified as adequate generally shall be occupied by military personnel within the grade category for which it was programmed, constructed, or otherwise obtained. Grade categories are: flag and general officers (0-7 through 0-10), senior grade officers (0-6), field grade officers (0-4 and 0-5), company grade officers (0-1 through 0-3 and W-l through W-4), senior NCO enlisted personnel (E-6 through E-9), junior NCO enlisted personnel (E-4 through E-5), and junior enlisted (E-l through E-3). Such housing is generally classified as married officer quarters (MOQ) and married enlisted quarters (MEQ) for inventory purposes. When civilians are assigned family housing on a rental basis, quarters do not lose their grade Category designation. Specific billet designations may be made by the installation commander when it is desired to specify particular family housing units for occupancy by key and essential military or civilian personnel.

1202. REDESIGNATION BY INSTALLATION COMMANDERS

1. Policy. Family housing which was constructed for one grade category may be redesignated for occupancy by personnel of other grade categories without prior approval of the CMC, subject to the following instructions:

a. In any redesignation of quarters, efforts shall be made to affect the maximum practicable degree of separation between quarters designated for officers and those designated for enlisted personnel.

b. When it is necessary to redesignate or reassign public quarters, current occupants should not be required to vacate such accommodations until their normal tours are completed, except in unusual cases.

c. Redesignation will remain in effect for a minimum of l year prior to change.

d. General officers quarters will only be designated or redesignated by Headquarters Marine Corps.

e. The installation commander may designate and redesignate public quarters for the specific occupancy of installation commanders, executive officers, chiefs of staff, sergeants major of predominant organizations, other key and essential military personnel, and (on a rental basis) key and essential civilians whose residence on station is required.

2. Redesignation Procedures

a. Strength-Asset Imbalance Method. Initially, an attempt will be made to ensure that an equal opportunity exists for different grade categories to obtain onbase housing. This should be done by balancing percentages of onboard grade category married personnel strengths with percentages of housing assets for like grade categories.

b. Waiting List Imbalance Method. If the aforementioned strength-asset imbalance fails to balance waiting lists to a manageable degree, an artificial readjustment may be made based on waiting list imbalances.

c. Survey Impact. Caution should be exercised to ensure that deficits reflected in the market analysis are not made significantly more disparate as a result of redesignations.

d. Reporting Redesignations. All redesignations shall be reflected on the next submission of the Family Housing Inventory and Occupancy Report (DD Form 14l0). Marine Corps Report Control Symbol DD-11101-26 (External RCS DD-P&L(A)1081) has been assigned to this report. (See appendix C.)

3. Conversion. Facilities constructed as family housing units, or permanently converted to that use, shall not be diverted to uses other than family housing without approval. Permanent diversions must be approved by the CMC (LFF). During periods of temporary or permanent diversion or conversion, the costs of maintenance and operation will be charged to the account normally financing the resultant facility. All diversions and conversions will be reported on the next regular submission of the Family Housing Inventory and Occupancy Report. Marine Corps Report Control Symbol DD-11101-26 (External RCS DD-P&L(A)l08l) has been assigned to this report.

## 1203. ADEQUACY AND INADEQUACY

1. Adequate Public Quarters. Adequate public quarters are those family housing units not specifically designated as inadequate by congressional legislation. Adequate public quarters are occupied on a full-forfeiture of entitlement to BAQ and VHA basis when used by members of the uniformed services and/or their dependents. Rents and charges for quarters occupied by nonmilitary personnel and/or their dependents will be collected from the occupants. (See appendix D.)

2. Inadequate Government-Owned Quarters

a. Inadequate Government-owned quarters are all substandard military housing, including Government-owned housing, as determined or designated per statutory authorization. These units are occupied on a partial forfeiture of entitlement to BAQ basis when occupied by members of the uniformed services and/or their dependents. Occupancy is voluntary (subject to appropriate regulations), unless otherwise directed. Rents and charges for inadequate quarters occupied by personnel other than members of the uniformed services and/or their dependents will be collected from the occupants.

b. Efficient and economical operation of Marine Corps inadequate quarters is essential if such housing is to be retained. Inadequate quarters will be retained only when the units are economical to operate and when a bona fide need exists. Unneeded and/or uneconomical inadequate quarters will be recommended for excess or demolition.

c. When an individual is no longer eligible for occupancy of inadequate quarters (by virtue of grade/promotion or availability) and chooses to relocate to adequate quarters, then said relocation will be accomplished within 3 working days after the availability of an appropriate set of quarters. Final inspection will be included during this period.

FAMILY HOUSING MANAGEMENT

SECTION 2: FAMILY HOUSING DESIGNATION, APPLICATION, ASSIGNMENT, OCCUPANCY, AND TERMINATION

PART C: APPLICATION FOR GOVERNMENT QUARTERS

1204. GENERAL INFORMATION

1. Assignment is the formal provision of Government quarters to an individual. All eligible personnel will be afforded an equal opportunity for those Government quarters designated for their applicable grade category and bedroom requirement. Assignment will be made on a nondiscriminatory basis without regard to race, color, religion, gender, or national origin.

2. No family shall be discriminated against in the assignment of Government family housing because of special health or physical disability requirements. When such needs exist, modifications to housing will be accomplished on a high priority basis to ensure assignment of housing at least as soon as it would have been otherwise available. At least 5 percent of the total military family housing inventory (no less than one house) of an installation shall be accessible to and usable by persons with disabilities. Modified housing units shall be either designed and constructed to be accessible, or readily and easily modifiable to be accessible, but in any event, modification of individual units will be accomplished on a high priority basis when a requirement is identified.

3. Military members have no legal or inherent entitlement to public quarters and it is not mandatory by law that Government quarters be provided. However, where the local communities cannot support our housing requirements, the Marine Corps will pursue the military construction of family housing. Marine Corps installations which operate and maintain family housing units are listed in table 1-1.

4. Installation commanders are given broad authority to plan, program, and determine the best use of resources so that all military members compete on an equitable basis for Government quarters managed by the installation.

Table 1-1.--Marine Corps Installations which Operate and Maintain Government Family Housing.

| Activity | Remarks |
|---|---|
| Marine Corps Recruit Depot/<br>Western Recruiting Region<br>San Diego, CA 92140-5001<br>(A) 524-4827 (Comm) 619-225-4827 | Limited billet designated quarters only. |
| Marine Corps Recruit Depot/<br>Eastern Recruiting Region<br>Parris Island, SC 29905-5001<br>(A) 832-2583 (Comm) 803-525-2583 | |
| Marine Corps Logistics Base<br>Albany, GA 31704-5001<br>(A) 567-5962 (Comm) 912-439-5962 | |
| Marine Corps Logistics Base<br>Barstow, CA 92312-5001<br>(A) 282-6706 (Comm) 619-577-6706 | |
| Marine Corps Air Station<br>Beaufort, SC 29904-5001<br>(A) 832-7706 (Comm) 803-522-7706 | |
| Marine Corps Finance Center<br>Kansas City, MO 64197-0001<br>(A) 463-2461 (Comm) 816-348-2461 | |
| Marine Barracks<br>8th & I Streets, S.E.<br>Washington, DC 20390-5001<br>(A) 288-3683 (Comm) 202-433-3683 | Limited billet designated quarters only. |
| Marine Corps Air Station<br>Yuma, AZ 85369-5001<br>(A) 951-3639 (Comm) 602-726-3639 | |
| Marine Corps Combat Development Command<br>Quantico, VA 22134-5001<br>(A) 278-2711 (Comm) 703-640-2711 | |
| Marine Corps Air Station<br>Cherry Point, NC 28533-5001<br>(A) 582-4345 (Comm) 919-466-4345 | |
| Marine Corps Air Station<br>El Toro, Santa Ana, CA 92709-5001<br>(A) 997-2262 (Comm) 619-726-2262 | CG MCAS, El TorO also manages housing for MCAS, Tustin |

Table 1-1.--Marine Corps Installations which Operate and Maintain Government Family Housing--Continued.

| | |
|---|---|
| Marine Corps Base<br>Camp Lejeune, NC 28542-5001<br>(A) 484-2895 (Comm) 919-451-2895 | CG MCB, Camp Lejeune also manages housing at MCAS, New River |
| Marine Corps Base<br>Camp Pendleton, CA 92055-5001<br>(A) 365-5217 (Comm) 619-725-5217 | |
| Marine Corps Air-Ground<br>Combat Center<br>Twentynine Palms, CA 92278-5001<br>(A) 952-6611 (Comm) 619-368-6611 | |
| Marine Corps Mountain Warfare<br>Training Center<br>Bridgeport, CA 93517-5001<br>(Comm) 916-495-2156 | CG MCB, Camp Pendleton manages MCMWTC Bridgeport housing. |
| Marine Corps Air Station<br>Iwakuni, Japan<br>FPO Seattle, WA 98764-5001<br>(A) 236-5541 | |

NOTE: Military family housing located in Hawaii and in Okinawa, Japan is managed under the single service central management system. Military family housing in Hawaii is managed by the U.S. Army, and in Okinawa by the U.S. Air Force.

Hawaii
Oahu Consolidated Family Housing Office
Headquarters, U.S. Army Spt Cmd
(Attn: APZV-OHK)
Fort Shafter, HI 96858-5000
(Comm) 808-477-9498

Okinawa
Consolidated Family Housing Office
18 CSW/DEH
APO San Francisco, CA 96239
(A) 634-1346

1205. DD FORM 1746. DD Form 1746 (Application for Assignment to Housing, figure 1-1) will be used for application for, and assignment to, Government quarters. Submission of DD Form 1746 with a copy of orders by applicants for Government family housing will replace the requirement for personnel to physically report to the housing office to have their names placed on the appropriate waiting list; however, applicants must physically report to the housing office before their name will be permitted to advance into the freeze zone.

1206. DD FORM 1747. DD Form 1747 (Status of Housing Availability, figure 1-2) will be used to provide an equitable system of furnishing military personnel with prior information as to the availability of military housing at the installation to which the member is to be assigned. Upon receipt of DD Form 1746, the receiving installation will immediately place the applicant's name on the appropriate waiting list and mail the applicant DD Form 1747 explaining the current housing situation as well as any pertinent information which will be beneficial to the service member applying for housing. Upon receipt of DD Form 1747, indicating quarters will not be available for assignment, military members are eligible to request, through their current appropriate chain of command, permissive temporary additional duty orders for the purpose of obtaining community housing.

1207. DETACHING INSTALLATION. Upon receiving PCS orders for a member of the command eligible for housing, the detaching commanding officer shall:

1. Require the individual to inform the housing office at least 30 days prior to the member's planned date to terminate quarters assignment. At the same time, the individual should complete DD Form 1746 to make application for family housing at any installation to which assigned.

2. Be responsible for mailing the completed application with a copy of the PCS orders, preferably 30 days or as soon as practicable prior to the individual's date of detachment, to the housing officer of the installation to which the service member is to be assigned. If a housing officer is not on the table of organization (T/O) at the receiving command, the application will be forwarded to the commander of the installation to which assigned. The leave address and telephone number will be noted, if applicable.

3. Counsel the military member that the use of DD Form 1746 does not preclude the requirement to report to the housing office at the new duty station and that even though the member's name may be on the waiting list, the name will not advance into the freeze zone until the military member physically reports to the housing office.

1208. JOINING INSTALLATION. The joining command performs as follows:

1. The housing office will use the effective date of change in duty station to determine a tentative control date. However, the applicant must physically

**APPLICATION FOR ASSIGNMENT TO HOUSING**
(Before completing form, read Privacy Act Statement and instructions on reverse)

1. TYPE HOUSING DESIRED (x one or both): a. MILITARY ☐ b. COMMUNITY ☐

**SECTION A – APPLICANT IDENTIFICATION AND FAMILY DATA**

2. NAME (Last, First, Middle Initial)
3. SSN
4. DOD COMPONENT
5. ADDRESS (Street, City, State, Zip Code)
6. PAY GRADE
7. MARITAL STATUS
8. RACE
9. ETHNICITY
10. TELEPHONE NUMBER: a. HOME (Area Code) b. DUTY (Autovon)
11. STATUS (x one): a. MILITARY MEMBER ☐ b. MILITARY SPOUSE ☐ c. CIVILIAN ☐

12. MILITARY CAREER INFORMATION (CIVILIANS SKIP TO QUESTION 13.) (Enter dates in YYMMDD order.)

| | MILITARY APPLICANT | MILITARY SPOUSE |
|---|---|---|
| a. EFFECTIVE RANK/RATE DATE | | |
| b. ACTIVE DUTY SERVICE COMPUTATION DATE | | |
| c. TIME REMAINING ON ACTIVE DUTY (Months) | | |
| d. ESTIMATED ROTATION DATE | | |
| e. REPORT DATE | | |
| f. ESTIMATED ARRIVAL DATE | | |
| g. DEPARTURE CONUS DATE (Overseas) | | |
| h. EFFECTIVE CHANGE IN DUTY STATION | | |

13. INSTALLATION / ORGANIZATION TRANSFERRED FROM
14. INSTALLATION / ORGANIZATION TRANSFERRED TO
15. I AM SEPARATED FROM MY DEPENDENTS (x one, if applicable): a. VOLUNTARILY ☐ b. INVOLUNTARILY ☐
16. I REQUEST HOUSING FOR (x one): a. SELF ONLY ☐ b. SELF AND DEPENDENTS LISTED IN ITEM 17 ☐

17. DEPENDENTS RESIDING WITH ME (If more space is needed, continue on plain paper.)

| a. NAME (Last, First, Middle Initial) | b. DATE OF BIRTH (YYMMDD) | c. AGE | d. SEX | e. RELATIONSHIP | f. DEPENDENCY AUTHORITY (DD Form 137) (YYMMDD) | g. REMARKS (Handicap, health problems, expected additions to family, etc.) |
|---|---|---|---|---|---|---|
| | | | | SPOUSE | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

**SECTION B – HOUSING DATA**

18. TYPE SERVICE DESIRED (x as applicable): a. MILITARY HOUSING ☐ b. HOUSING REFERRAL SERVICES ☐
19. DATE HOUSING NEEDED (YYMMDD)
20. LOCATION PREFERENCE (Community Housing)
21. PRICE RANGE (Community Housing)

22. HOUSING DESIRED (x (1)-(12) as applicable, write in number in (13) and (14), write Yes or No in (15).)

| | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | (1) HOUSE / PURCHASE | | (4) ROOM | | (7) SUBLET | | (10) FURNISHED | | (13) NO. BEDROOMS |
| | (2) HOUSE / RENT | | (5) ROOM & BOARD | | (8) TRANSIENT | | (11) UNFURNISHED | | (14) NO. BATHS |
| | (3) APARTMENT | | (6) SHARE | | (9) MOBILE HOME | | (12) MOBILE HOME PARK | | (15) PETS (Yes/No) |

23. REMARKS

24. MANDATORY HOUSING CERTIFICATION (Military Only) In the event assignment to housing becomes mandatory, this is to certify that I (x one) → a. DO ☐ b. DO NOT ☐ desire a waiver to reside in community housing.
25. SIGNATURE OF APPLICANT
26. DATE SUBMITTED (YYMMDD)

**SECTION C – DISPOSITION** (To be completed by Family Housing Office.)

27. MILITARY HOUSING
a. APPLICATION RECEIVED (YYMMDD and hour)
b. APPLICATION EFFECTIVE (YYMMDD)
c. DD FORM 1747 SENT OR GIVEN TO APPLICANT (YYMMDD, Military Only)
d. HOUSING AVAILABILITY (Indicate the applicable box(es) marked in Item 4, DD Form 1747.)
e. APPLICANT PLACED ON THE FOLLOWING HOUSING WAITING LIST (If not applicable, complete Item 28a.)
f. EFFECTIVE PLACEMENT (YYMMDD)
g. BEDROOMS REQUIRED
h. DATE ASSIGNED (YYMMDD)
i. HOUSING UNIT ASSIGNED (Address)

28. COMMUNITY HOUSING
a. APPLICANT NOT PLACED ON A HOUSING WAITING LIST (x as applicable): (1) Applicant ineligible for Military Housing ☐ (2) No response after initial application (No assist) ☐
b. LOCATION OF HOUSING (Number, Street, City, State, Zip Code)
c. IF HOUSING ACQUIRED IS UNACCEPTABLE, INDICATE REASON(S) (x as applicable):

| | | | | | |
|---|---|---|---|---|---|
| | (1) TOO EXPENSIVE | | (5) UNSAFE | | (9) NO POTABLE WATER |
| | (2) NO ELECTRICITY | | (6) NO HEAT | | (10) NO FLUSHABLE TOILET |
| | (3) NO HOT WATER | | (7) UNSANITARY | | (11) TOO FAR FROM BASE (One way commute) MILES MINUTES |
| | (4) NOT ENOUGH BEDROOMS | | (8) NO SHOWER OR BATH | | |

d. ACCEPTABILITY VERIFICATION

DD Form 1746, APR 86 — This form supersedes all editions of DD Form 1668 and all previous editions of DD Form 1746

Figure 1-1.--Application for Assignment to Housing.

report to the housing office with a verified endorsement from the previous command before advancing to the freeze zone.

2. In the event the member does not report to the housing office by the date the members's name would enter the freeze zone, then the member will remain stationary on the waiting list for 30 days or until the member does physically report to the housing office. After 30 days, the housing officer will remove the member's name from the waiting list and place the member's DD Form 1746 on file for an additional 30 days before disposal. If the member reports to the housing office during this final 30 days, the member should be placed back on the waiting list in the spot just below the freeze zone from where it was originally removed, provided the individual reports to the housing office within 30 days of reporting to the member's new duty station.

3. When an individual reports to the housing office without having submitted DD Form 1746, the housing officer will use the military member's detachment date from the last permanent duty station to determine the individual's control date. The military member's name will be placed on the appropriate waiting list provided the individual reports to the housing office within 30 days of reporting to the new duty station. The control date will be the date of application for all military members who do not report to the housing office within the 30-day requirement.

**STATUS OF HOUSING AVAILABILITY** *(DoDI 4165.44)*

**1. FROM:** Family Housing Office
a. Installation Name

b. Phone *(Autovon)* *(Commercial)*

**2. TO:** Applicant's Name *(Last, First, MI)*

**3. YOUR APPLICATION FOR MILITARY FAMILY HOUSING WILL BE EFFECTIVE** *(Day, Mo, Yr, Hour)*

**4. YOU ARE ADVISED THAT:** a. You can expect military family housing to be available

| | | | |
|---|---|---|---|
| ☐ | (1) Immediately upon your arrival | ☐ | (3) Within 12 months of your arrival |
| ☐ | (2) Within approx 30 days of your arrival | ☐ | (4) After 12 months or more, or not at all |

b. Considering the availability of family housing you should make alternative housing arrangements that will be

☐ Temp ☐ Semi-Perm ☐ Permanent

c. It is anticipated that occupancy of family housing will be

☐ Mandatory ☐ Voluntary

| | | | |
|---|---|---|---|
| ☐ | d. Because of your particular circumstances, you will not be mandatorily assigned to military family housing | ☐ | e. Although not anticipated at this time, mandatory assignment to military family housing may be required if there are not enough voluntary occupants |

f. Comments

**5. HOUSING AVAILABILITY IN THE COMMUNITY IS:** ☐ Good ☐ Fair ☐ Limited

**6. YOU MUST CONTACT THE FAMILY HOUSING OFFICE** *(housing referral)* **UPON ARRIVAL BEFORE YOU MAKE HOUSING ARRANGEMENTS, AND TO BE INFORMED OF ANY CHANGES TO THE ABOVE.**

**7. SIGNATURE** *(Family Housing Office Representative)*

**8. DATE** *(Day, Month, Year)*

**DD Form 1747, OCT 85** *84 FEB edition may be used.* ☆ USGPO 1985-491-103/5[illegible]

Figure 1-2.--Status of Housing Availability.

4. When an individual, who is already on a waiting list, becomes eligible for a different waiting list due to promotion or increase in the number of dependents, that individual shall be moved to the appropriate waiting list, using the original control date.

1210. WAITING LISTS

1. Waiting lists for military personnel will be established by grade categories (i.e., senior grade officers, field grade officers, company grade officers, senior noncommissioned officers (staff sergeants and above), junior noncommissioned officers (sergeants and Corporals), and junior enlisted personnel (privates through lance corporals)) and bedroom composition. The waiting lists will be maintained by the installation's family housing office. The location of a military member's name on a waiting list is predetermined, based on the individual's control date. The top 10 percent or top 3 applicants, whichever is greater, on each waiting list comprise the stabilized portion or the freeze zone of that list.

2. Waiting lists will be publicly posted or otherwise made available to applicants at the housing office during normal working hours. Waiting lists will be updated at least every 15 days.

3. During the period when an applicant's name is on a waiting list for a family dwelling unit of a particular size, the applicant may request a change to a listing for a unit of different size, if circumstances justify the change. The applicant's place on the new list may be as of the date of the original application or such other position as the installation commander determines appropriate.

4. The relative position of personnel in the freeze zone on each waiting list will be stabilized and not altered by placing new arrivals within the freeze zone, regardless of the grade or duty assignment, with the following exceptions:

a. Designated key and essential military or civilian personnel may be assigned to available housing upon arrival or placed in position of priority on the list. Applicants given a firm housing commitment should not be displaced.

b. When unusual circumstances warrant, as determined by the installation commander. In cases involving hardship, determination for priority assignment will be based on written documentation that verifies the need for military, vice civilian, family housing.

5. The freeze zone may be extended to include more than 10 percent of the individuals on the waiting list if recently constructed or rehabilitated units are about to come on line. The revised freeze zone may include only those personnel who it is anticipated will be assigned housing within 60 days.

6. Personnel arriving at MCAS, Iwakuni on a consecutive overseas tour may be entered at the bottom of the freeze zone.

7. In those cases when personnel are selected or frocked for promotion they may be assigned and occupy housing designated for their new pay grade.

8. Installations with both 1 and 2-bedroom units may combine the waiting lists into a single 2-bedroom waiting list for assignment purposes. As a 1-bedroom unit becomes available, the first 1-bedroom requirement applicant on the waiting list will be offered the quarters if there are no 2-bedroom requirement applicants that are higher on the waiting list that want the housing unit.

9. Two and 3-bedroom waiting lists will not be combined to compensate for a shortage of 2-bedroom units.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 2: FAMILY HOUSING DESIGNATION, APPLICATION, ASSIGNMENT, OCCUPANCY, AND TERMINATION

## PART D: ASSIGNMENT TO GOVERNMENT QUARTERS

### 1211. GENERAL INFORMATION

1. Normally, married officers, married enlisted personnel, and eligible service members who are unmarried, divorced, separated, or widowed with accompanying dependents will be assigned public quarters per their precedence on the family housing waiting list without regard to billet assignment.

2. A service member with imminent marriage plans is eligible to apply for family housing 30 days prior to marriage. The service member must provide evidence of the planned marriage date to the housing manager on the date of application. The member’s name will not be allowed to enter into the freeze zone of the waiting list until actual proof of marriage is presented to the housing manager. If the installation does not have a waiting list, actual housing assignment will not be made until proof of marriage is provided the housing manager.

3. The assignment to public quarters and Government-owned housing under the jurisdiction of the Marine Corps will be made by the installation commander having cognizance over the quarters or the installation commander’s duly authorized representative.

4. Service members will be provided no less than a 31-day advance notice of housing assignment, unless unusual circumstances prevent it, so that proper notice and release from civilian housing can be made.

### 1212. KEY AND ESSENTIAL PERSONNEL

1. Military necessity will take precedence over all other considerations in priority of assignment to military family housing; however, such assignments will be held to a minimum. Military necessity may apply to both military or civilian personnel.

2. The installation commander may assign precedence to eligible personnel who are considered key and essential to be quartered on the installation. A listing of key and essential billets must be published by the installation commander and reviewed for continued validity on an annual basis. Prospective assignees to

these billets should be informed of the requirement to live in Government quarters through the use of DD Form 1747.

3. Key and essential civilians in CONUS may occupy adequate family housing on a rental basis. However, prior approval of the CMC (LF) is required. Special circumstances pertaining to the assignment must be fully described in the justification accompanying the request.

1213. PRIORITY OF ASSIGNMENT

1. Priority 1: Key and essential military personnel/civilian employees.

2. Priority 2: Service members and eligible civilians who are assigned to, or attached for duty at, the installation or who are assigned to other installations that are served by the housing complex. Eligible Marine Corps personnel on independent duty (recruiters, inspector-instructors, Reserve Officer Training Corps instructors, etc.) if within 60 minutes traveling time from the installation during normal rush hour traffic.

3. Priority 3: Eligible military personnel and eligible civilian employees of all military services assigned to duty in the areas of the particular installation. Students on the Law.

4. Priority 4: Unaccompanied families of eligible personnel who currently do not occupy family housing at the installation.

5. Priority 5: Ineligible civilian employees.

1214. DURATION OF ASSIGNMENT. Quarters are normally assigned to permit use for the greatest possible duration of a duty tour to achieve maximum benefit and reduce costs attributable to change of occupancy. Except for family housing provided to personnel attending schools, assignments should not be made when anticipated occupancy will be of short duration. A reasonable minimum occupancy period of at least 6 months is recommended, depending on the individual circumstances.

1215. ASSIGNMENT OF QUARTERS BY GRADE CATEGORIES AND BEDROOM COMPOSITION

1. Quarters are constructed and shall be designated as senior officer quarters, field grade officer quarters, company grade officer quarters, senior NCO enlisted quarters, junior NCO enlisted quarters, and junior enlisted quarters. It is the policy of the CMC that physical separation will exist between categories insofar as possible.

2. The following occupant bedroom eligibility guidelines are established; however, they may be modified by the installation commander to meet local requirements:

a. Sponsor or sponsor and spouse, and married dependents (e.g., parents) normally should be assigned 1 bedroom.

b. Each dependent should normally be assigned one bedroom. The service member may choose to be assigned to a unit where more than one dependent shares a bedroom. No more than two dependents should share a bedroom unless the installation commander determines the bedroom is large enough to accommodate more than two persons.

3. The installation commander may stipulate two dependents of the same sex share a bedroom for equitable allocation of the inventory.

4. Colonels and above should normally be assigned a minimum of 4 bedrooms. Field grade officers, CWO-4's, and enlisted members with the rank of first sergeant/master sergeant and above should normally be assigned a minimum of 3 bedrooms.

5. When the sponsor or spouse is pregnant, the sponsor may apply for and occupy housing with a separate bedroom for the expected child.

6. Unmarried pregnant service members without dependents may apply for family housing but shall not be assigned quarters until the birth of the child. The member's name shall be allowed to rise up to the top of the waiting list, but will not enter the freeze zone until after the birth of the child.

## 1216. SPECIAL ASSIGNMENTS

### 1. Temporary Duty Assignments

a. An individual reporting for temporary duty, when accompanied by dependents at the member's own expense, may be assigned to public quarters at an installation where all public quarters are not needed for assignment to personnel on permanent duty.

b. Normally, a minimum occupancy period of at least 6 months is recommended to reduce costs attributable to change of occupancy.

2. Unaccompanied Chaplains. Unaccompanied chaplains may be assigned military housing when it is determined that such housing is essential to the performance of their professional and pastoral duties. Diversion of family housing for use by unaccompanied chaplains shall conform to the policy outlined in paragraph 1202.3 of this Manual.

### 3. Bachelor and Unaccompanied General Officers

a. Bachelor general officers will normally be assigned to designated GOQ's. These quarters must first be temporarily diverted to bachelor quarters following the guidance outlined in paragraph 1202.3 of this Manual. The quarters will revert to family housing upon vacancy of the bachelor resident. This policy shall also apply to installation commanders for whom command quarters have been designated.

b. General officers serving an accompanied tour, but who are unaccompanied by their dependents, will not be assigned to designated GOQ's or other family

quarters without prior approval of the CMC (LF). In this instance, unaccompanied shall be construed to mean that the dependents of the general officer will not join their sponsor within a period of 120 days after assuming the new duty assignment. This policy shall also apply to installation commanders for whom command quarters have been designated.

4. Intrastation Reassignments

a. Once assigned to a set of adequate quarters, an occupant will not normally be reassigned to another set of quarters during the tour of duty at that installation.

b. Circumstances such as an increase in the number of dependents, ages of children, promotion to a higher grade category, etc., may be considered as justification for reassignments considered on a case-by-case basis by the installation commander.

c. In those circumstances where an occupant becomes eligible for reassignment to another category of quarters, the service member may apply for reassignment, and after approval by the installation commander, be placed on the bottom of the waiting list for the new category with a new control date determined by the date of the circumstance upon which the service member’s entitlement to the new category occurred.

d. Intrastation reassignments are authorized only when at least 6 months occupancy of the new quarters can be expected, thereby minimizing change of occupancy costs.

5. Assignment of Public Quarters When Both Members of a Family Unit are Members of the Uniformed Services

a. Without Dependents. When both husband and wife are members of the uniformed services, with no other dependents, and are stationed at the same or adjacent military installation, the eligibility for assignment to public quarters rests with either member. When both members concerned are precluded by distance from living together, both are considered as members without dependents for the purpose of determining entitlement to BAQ/VHA and are, therefore, not eligible for assignment to public quarters except as noted herein.

b. With Dependents. When both members concerned are in the uniformed services and either or both have dependents other than the spouse, the eligibility for assignment to public quarters for the member and the dependents rests with either member.

c. Male Enlisted - Female Officer, or Vice Versa. Assignment to public quarters under these circumstances is not considered to be in the best interest of the Marine Corps. Accordingly, such assignments will not normally be made. Assignments to public quarters under this circumstance will be considered on a case-by-case basis. Submit request via the normal chain of command to the CMC (LF). Approval of such requests is not normally granted.

d. Continued Occupancy. If one member is separated from the other as a result of assignment to a dependent restricted tour, the other member may request permission to retain quarters under the continued occupancy policy.

6. Excess Leave Program Students

a. Students on the LAW may retain currently occupied quarters or apply for military family housing.

b. When students on LAW occupy military family housing, they will be charged a rental fee equal to the BAQ and applicable VHA rate of active duty personnel of comparable rank. When these students are in an active duty status, any housing allowances forfeited while in that pay status will be deducted from the rental charge.

7. Foreign Nationals. Where a specific agreement exists between the foreign government and the United States regarding provision of family housing, personnel of that government will be provided family housing per the terms of that agreement. Where military family housing is made available for other foreign nationals including foreign students, rental rates will equal the "fair market value." If a "fair market value" has not been determined, then the installation commander will charge a cost equal to the BAQ and applicable VHA rate for a comparable ranking U.S. military member.

1217. ASSIGNMENT CONSIDERATIONS

1. Assignment to Quarters at Another Command. When a military member is assigned for duty at an installation different from the installation which has cognizance over the Government quarters the military member is occupying, that military member’s installation commander is responsible for notifying the installation commander who has cognizance over the quarters, of the transfer date and name of the new installation that the service member is being transferred to. The commander responsible for the quarters will then decide whether the service member is entitled to continue the occupancy of those quarters and, if not, will take the necessary action to terminate the occupancy.

2. Assignment to More Than One Set of Quarters

a. When a family’s composition/bedroom requirement dictates a need for occupying adjoining quarters (duplex) and there is an excess of public quarters at an installation, the installation commander may authorize such an occupancy. Such additional occupancy will be regarded as temporary. Any modification of buildings must have the installation commander’s approval.

b. Assignment/occupancy of more than one set of public quarters at the same time at different duty stations is prohibited except as noted in this chapter. It is the responsibility of the commander at the new duty station, to ascertain whether the service member has terminated a previous assignment to public quarters at the old duty station. However, in the event this occurs, the

housing officer at the military member's new duty station will charge the military member a rental fee, equal to the BAQ plus applicable VHA rate (at that particular installation).

3. Assignment Presumed Adequate. Any public quarters voluntarily accepted shall be conclusively presumed to be adequate for that occupant. For the purpose of this paragraph, substandard quarters are excluded.

4. Assignment of Divorced Members/Joint Custody. The installation commander has the final decision on assignment of housing when joint custody is involved. The decision should be based on the following guidelines.

a. Eligibility for housing will be determined based on physical custody of dependents. Eligibility for housing is not dependent upon BAQ status. Appropriate BAQ forfeiture should be determined by the disbursing office as a matter under their cognizance.

b. Sponsors assigned housing should normally have custody of dependents for over 6 months. If both divorced parents are assigned to the same installation, only 1 will normally be eligible for housing.

c. If both parents have been decreed equal custody time they may both be ineligible for housing. One parent may waive their right to housing in favor of the other parent.

1218. INSPECTION AND ACCEPTANCE OF QUARTERS. Upon assignment of quarters and prior to occupancy, a joint inspection of the quarters and an inventory of property will be made by a representative of the housing office and the prospective occupant. The housing representative will fill out the inspection and inventory forms indicating the condition of the property. If the prospective occupant has comments on the condition of items noted during inspection, those comments will be entered on the appropriate form. After completing the inspection, the occupant will be required to sign the forms indicating agreement with the inventory and condition of the house and property as noted on the form.

SECTION 2: FAMILY HOUSING DESIGNATION, APPLICATION, ASSIGNMENT, OCCUPANCY, AND TERMINATION

PART E: OCCUPANCY OF FAMILY HOUSING

1219. GENERAL INFORMATION. Housing is assigned primarily for use by the dependents of the sponsor, and the sponsor to whom it is assigned. Social visits, such as might occur in private housing, are acceptable so long as guests meet standards of conduct prescribed for residents by the installation commander.

1220. DOUBLE OCCUPANCY BY FAMILIES OF TWO SPONSORS. Double occupancy of a single set of quarters by the families of two service members in excess of 90 days is considered to be assignment to quarters for both sponsors and will cause both sponsors to forfeit their BAQ and VHA, if applicable.

1221. EXTENDED VISITATIONS BY NON DEPENDENTS

1. A guest is defined as a person who is present at the invitation of the military sponsor and does not contribute directly or indirectly to any of the household expenses that the sponsor must bear because of such a visit.

2. All requests for extended visitations (visits in excess of 30 days or as determined by the installation commander), regardless of the duration, are within the approval/disapproval authority of the installation commander.

3. The installation commander is responsible for establishing local procedures for guest visitations, to include identification of the guest(s) by name, home address, social security number, housing unit, and duration.

1222. SEMIPERMANENT RESIDENCE OF COURT APPROVED WARDS. FOSTER CHILDREN. AND PERSONS WHO HAVE STOOD IN LOCO PARENTIS. Requests for extended (semipermanent) occupancy privileges for court approved wards, foster children, and nondependent relatives who have stood in Loco Parentis of the service member, may be approved by the installation commander. The following definitions apply to this delegation of authority:

1. Legal Wards. Legal wards are defined as those individuals whose custody has been awarded to a service member or member’s spouse by a court of law (not a notary public).

2. Foster Children. Foster children placed by a competent legal authority in the home of a service member may be permitted residence in military family housing for an indefinite period, provided any compensation for housing paid

over and above actual costs to the service member is not accepted from the sponsoring agency. Such authorization will not in and of itself entitle the sponsor to a unit with an additional bedroom(s); however, this may be authorized by installation commanders due to extenuating circumstances and when all of those families with legitimate entitlement to the larger type unit have been accommodated.

3. Person(s) Who Have Stood in Loco Parentis. Person(s) (such as parents) upon whom the service member or spouse was dependent for at least 5 years prior to entry into the service, but who are not dependent on the service member for at least 50 percent of their support, may be permitted residence in Government family quarters for an indefinite period. Such authorization will not in and of itself entitle the sponsor to a unit with an additional bedroom(s). However, this may be authorized by installation commanders due to extenuating circumstances and when all of those families with legitimate entitlement to the larger type unit have been accommodated.

1223. SUBLETTING OF QUARTERS. Public quarters, including substandard quarters, mobile home spaces, and leased housing may not be sublet by the occupant or used in any manner for which the member might be compensated.

1224. HOME ENTERPRISES. Commercial activities, and/or self-employment from Government quarters may be authorized as provided below:

1. Requests for permission to conduct a home enterprise such as childcare, tailoring, tax preparation, dressmaking, merchandise sales, etc., in military family housing should be made in writing to the installation commander or designee who should ensure that each request is expeditiously answered in writing. Such issues as local government licensing requirements, potential Government liability, overseas status of forces agreements, host country business practices, and prospective advertising practices should be taken into account as each request is considered. In no case will activities be authorized or continued at the expense of military community tranquillity or safety. Utility costs associated with home enterprises should be recouped when such collections are practical.

2. When feasible, commanders should allow occupants to make minor modifications to housing units at the occupant’s personal expense. Any request to perform minor modifications must be approved by the installation commander. The occupant should be advised that they will be required to return the house to its original condition prior to vacating quarters, unless the installation commander desires to leave the modification intact.

3. The provisions of current directives for standards of conduct concerning solicited sales apply. Authorization of family member employment in Government quarters should be conditioned upon agreement by the family member to comply with these provisions and regulations prohibiting solicited sales to subordinates and governing solicitation in general. Home businesses will be restricted to the sale of merchandise and the provision of service that is not

normally available in a commercial retail environment; i.e., Avon, Mary Kay, Amway, and other personalized services. In other words home enterprises should not duplicate the sale of merchandise and service readily available through the installation's officially sanctioned commerce.

4. It is the responsibility of the occupant of Government family housing to have an approved request before soliciting within a family housing area or conducting a private business to include child day-care activities in a family housing unit or area. In all cases, the conduct of a private business in Government family housing units or areas must be in strict compliance with applicable Federal, State, and local ordinances.

## 1225. SPECIAL RETENTION 0F QUARTERS

1. Authority to Remain in Quarters After Separation. In certain hardship cases, personnel discharged, released from active duty, or retired may remain in public quarters for up to 60 days after the effective date of such orders for a rental fee. The installation commander may approve requests for extensions beyond 60 days when unusual circumstances warrant consideration. A "fair market rental value" will be charged per appendix I of this Manual. If such a value has not or cannot be determined, the installation commander will charge a cost equal to the BAQ plus VHA at the former service member's rate of allowances. The following situations are deemed worthy of favorable consideration to remain in quarters beyond the 60-day authority:

a. Illness of a member of the immediate family wherein the attending physician predicts a short life expectancy.

b. Illness of spouse or child where retention at the present duty station is necessary for treatment to ensure recovery, as substantiated by the physician.

c. Situations which impose a severe problem on the Marine or the Marine's immediate family, the solution of which can be achieved only by remaining in the assigned quarters.

d. Service members otherwise qualified for continued service, but involuntarily separated under honorable conditions during the 5-year period beginning on l October 1990, may be permitted to remain in military family housing or housing leased by DoD, for not more than 180 days after separation.

2. Members in a Non'pay Status. Assignment to quarters will not be contingent on the right to receive pay. Military and/or dependent members may be authorized to remain assigned to quarters while in a nonpay status under the following conditions:

a. LAW. Students on the LAW may retain currently occupied quarters. However, students will be charged a rental fee equal to the BAQ and VHA of active duty personnel of comparable rank.

b. Unauthorized Absence. For a period not to exceed 60 days from the first day of absence, occupancy of quarters may continue by the service member's dependents at no cost to the dependents under the following conditions:

(1) The member has been in an unauthorized absence status for more than 29 consecutive days.

(2) The dependent(s) applies for continued occupancy and the application is received by appropriate authority within 30 days after the date absence commenced.

(3) No positive information has been received that the dependent(s) is residing with, or has joined, the member at the place of absence.

(4) No payment of BAQ/VHA may be made.

c. Military Members in a Confinement Status. The family of a military member sentenced to confinement may be permitted to remain in quarters per paragraph 1231.11 of this Manual.

3. Continued Occupancy/Retention of Quarters by Dependents of Absentee Sponsors. The dependents of an absentee sponsor (sponsor serving on an unaccompanied dependents restricted tour of duty) may retain quarters during the sponsor's absence. Marine Barracks, Washington, DC, and Marine Corps Recruit Depot (MCRD) WRR, San Diego, are excluded from this policy. Dependents of personnel serving in the unit deployment program (under the home-basing concept where the deployed unit will return as a group to the same installation from which deployed) may continue occupancy of public quarters during the sponsor's absence.

a. This policy is not applicable to leased public quarters or to quarters outside CONUS.

b. General officer and billet-designated quarters are excluded from the provisions of this policy. Dependents occupying such quarters are eligible for priority assignment to other quarters, if available, at the same installation, with movement chargeable to PCS funds. Quarters provided to dependents of general officers in this case will not be considered GOQ's.

c. Requests for retention under this policy shall be submitted to the installation commander at least 30 days prior to departure. Requests shall contain the following statements of understanding:

"I understand that quarters retained by my dependents may be terminated if my dependents are involved in misuse or illegal use of the quarters or conduct themselves to the detriment of community safety, health, or morale."

"I agree to notify the housing officer and move my dependents immediately if my marital status changes to make them ineligible for occupancy of public quarters."

"I agree to notify the housing officer immediately in the event I am discharged from the service while my spouse occupies public quarters"

"I have been counseled that my failure to notify the housing officer in the event of legal separation or divorce may result in disciplinary action."

"I have been counseled that, should I lose my entitlement to occupy quarters due to a change in my marital status, my spouse may be required to vacate quarters. Should my spouse decline to vacate quarters on a date specified, action may be initiated through the U.S. district attorney for eviction of the spouse by court order."

d. To be eligible for retention by dependents, the sponsor must have been assigned in writing to the quarters prior to the date of departure from the installation.

e. Personnel retaining housing under this policy and who are reassigned to the same installation upon completion of their dependents restricted tours may continue to occupy quarters upon their return.

f. Personnel retaining housing under this policy but who are reassigned following their dependents restricted tour to another installation are required to clear quarters within 90 days after their return to CONUS or Hawaii pursuant to PCS orders. Requests for extension beyond this period may be approved or disapproved by the installation commander when unusual circumstances warrant such consideration.

g. A sponsor whose family remains in quarters under this policy is responsible for keeping the appropriate family housing office informed of changes in status which may affect the sponsor’s continued eligibility for quarters or the projected date of return from overseas. Sponsors who request and/or receive extensions of their overseas tours should inform the appropriate housing office. Authorization for continued occupancy of public quarters will be automatic in such cases.

h. At the discretion of installation commanders, quarters occupied by dependents under this policy may be terminated when dependents are involved in misuse or illegal use of quarters, or other misconduct contrary to safety, health, or morale, or when marital status changed to make dependents ineligible for occupancy of public quarters. Refer to MCO P1751.3 for information pertaining to changes in marital and dependency status.

i. Installation commanders should strongly encourage service members to execute a limited power of attorney prior to their departure for overseas when they take advantage of this policy. This will permit dependents to act in their behalf in matters pertaining to housing, transportation entitlement, auto registration, etc. This service is provided free of charge by the installation’s legal assistance office.

j. This policy concerning retention of quarters also applies to a sponsor serving an "all others’ unaccompanied dependents restricted overseas tour.

k. Families awaiting dependents entry approval to Adak, Alaska; Guantanamo Bay, Cuba; Keflavik, Iceland; or Midway Island, who currently occupy military housing at the installation, may remain in quarters until such time that military quarters are available at the new duty station.

4. Continued Occupancy/Retention of Quarters by a Marine's Family in CONUS While the Marine is Awaiting Assignment to Government Housing in WestPac and those Locations Listed in Paragraph 1225.3k Immediately Preceding. Subject to the following provisions, dependents of Marine personnel who are ordered on an accompanied tour to those locations identified above, may retain Marine Corps Government quarters in CONUS until family housing is available at the overseas location.

a. This policy is not applicable to leased public quarters or to quarters outside CONUS.

b. General officer and billet-designated quarters are excluded from the provisions of this policy.

c. Requests for retention under this policy shall be submitted to the installation commander at least 30 days prior to the effective date of the PCS orders.

d. To be eligible for retention by dependents, the sponsor must be in Government housing at the time of the submission of the request.

e. Requests shall contain the following statements of understanding and advisement of counseling:

"I agree to notify the housing office having jurisdiction over the quarters my dependents are occupying and to move my dependents immediately if my marital status changes to make them ineligible for occupancy of public quarters, or in the event I am discharged from the service."

"I have been counseled and understand that quarters retained by my dependents may be terminated if my dependents are involved in misuse or illegal use of the quarters or conduct themselves to the detriment of community safety, health, or morale."

"I have been counseled and understand that if I lose my entitlement to occupy Government quarters due to a change in my marital status, my spouse may be required to vacate quarters. If my spouse declines to vacate quarters on the date specified, then eviction procedures may be initiated."

"I have been counseled and understand that my failure to notify the housing officer in the event of a legal separation or divorce may result in disciplinary action."

"I have been counseled and understand that every effort will be given to provide me advance notice of when housing will become available in WestPac to allow time for my dependents to terminate quarters in CONUS prior to being assigned quarters in WestPac. If, however, for any reason I am assigned to WestPac housing prior to my dependents vacating CONUS Government housing, I will be required to pay for both quarters."

"I have been counseled and understand that if I am assigned quarters in WestPac prior to my dependents vacating CONUS Government housing I will be charged for both quarters by forfeiture of the applicable housing allowances for the WestPac quarters plus a daily rental fee for the unvacated CONUS quarters. The rental charge for the CONUS quarters will be equal to my respective housing allowance (BAQ/VHA rate) for my applicable rank at that CONUS duty station."

"I have been counseled and understand that once I have been notified that Government housing will be available for me and my family in WestPac, it is my responsibility to make the necessary arrangements for vacating the CONUS Government housing and the travel requirements to WestPac for my dependents."

"I have been counseled and understand that a limited power of attorney may be required for my dependents to make arrangements in my absence in matters pertaining to housing and transportation entitlement. I further understand that this service is provided free of charge by the installation’s legal assistance office. If a power of attorney is required, then a copy of it will be submitted with the request for retention of quarters."

"I have been counseled and understand that this authority for my dependents to remain in quarters can only be authorized for a 1-year period. Requests for beyond 1-year will only be considered for hardship cases."

"I have been counseled and understand that upon arriving at my new command in WestPac I must immediately report to the housing office and make it known that my family is still residing in CONUS quarters while awaiting quarters in WestPac.

"I have been counseled and understand that if I refuse Government housing in WestPac, I must immediately notify the housing office which has charge of the CONUS quarters, and I will have 30 days to vacate my dependents from Government quarters."

"I have been counseled and understand that it is my responsibility for keeping the appropriate family housing office informed of any change in status which may effect my dependents continued eligibility for quarters."

f. Marine Corps commands will ensure that a Marine requesting retention of quarters under these special circumstances submits the required statements of understanding and advisement of counseling and a copy of the power of attorney.

g. The Marine should be counseled that all efforts will be made to provide sufficient advance notice for assignment to WestPac Government housing. In this respect, a 30-day advance notice of quarters availability can be anticipated.

Personnel who apply and qualify for housing at Marine Corps Air Station (MCAS), Iwakuni, will be provided a 30-day advance notice of housing availability. The 30-day advance notice is also required and provided by the United States Air Force which manages Marine Corps housing On Okinawa. During this 30-day period, Marines are expected to make all the necessary arrangements for their dependents to vacate CONUS quarters and travel to WestPac. The 30-day notice should allow the Marine sufficient time to accomplish this so the assignment of two quarters simultaneously will not be required. It should be noted that if the assignment of these quarters overlaps, the Marine will be charged for both sets of quarters.

1226. SUBSTANDARD GOVERNMENT-OWNED QUARTERS. It is Marine Corps policy that assignment of Marine Corps managed substandard quarters generally should be restricted to junior enlisted personnel on a voluntary basis. However, installation commanders may make substandard quarters available to all enlisted personnel on a voluntary basis, according to their bedroom requirements on a first-come-first-served basis regardless of rank. Officers and eligible civilians may occupy substandard housing on an equal basis only after the enlisted waiting list has been exhausted. Substandard quarters will not be used as temporary housing while awaiting assignment to adequate quarters or when vacating adequate quarters. If a Marine declines to occupy a substandard set of quarters that have been offered, the Marine’s position on the waiting list for adequate quarters is not affected.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 2: FAMILY HOUSING DESIGNATION, APPLICATION, ASSIGNMENT, OCCUPANCY, AND TERMINATION

## PART F: TERMINATION OF ASSIGNMENT

1227. GENERAL INFORMATION. Quarters assignment is normally terminated within 30 days of the effective date of PCS orders, except where continued occupancy by dependents of overseas absentee sponsors is authorized or otherwise provided for within this chapter.

1228. TERMINATION INSPECTIONS. Regardless of the reasons for termination, the quarters are to be inspected prior to releasing occupants from the quarters.

1229. PRETERMINATION INSPECTION

1. The pretermination inspection should be accomplished as soon as possible after receipt of the occupant’s notice of intent to vacate and should be jointly conducted by the housing representative and the occupant of the unit. The pretermination inspection serves two purposes. One is to tactfully but firmly alert occupants to the deficiencies they must correct and the degree of cleanliness to be achieved prior to vacating. This will allow the occupant sufficient time to prepare the unit for the termination inspection. Secondly, the pretermination inspection will allow time to identify maintenance deficiencies and to plan and coordinate the scheduling of the required work to be accomplished prior to reoccupancy of the unit.

2. This inspection must be conducted equitably, and sound judgment must be exercised by the housing representative in determining deficiencies caused by normal wear and tear versus deficiencies attributable to occupant negligence. As a minimum, the inspection should include the following:

a. Mutually discussing the existing conditions compared with those conditions noted during the check-in inspection.

b. Mutually scheduling the termination inspection and informing the occupant that all occupant-caused deficiencies must be corrected prior to the termination inspection.

c. Identifying and scheduling maintenance work required for the interior, the exterior, supporting structures, and surrounding grounds. Normal change of occupancy maintenance should be accomplished immediately after a dwelling is vacated.

d. Informing occupants that they continue to be responsible for the condition of the unit at final checkout inspection even though they may use a private contractor to correct a deficiency which was the occupant's responsibility.

1230. TERMINATION INSPECTION. The termination inspection will be conducted jointly by a housing representative and the occupant after quarters are vacated and prior to the formal cessation of assignment. It should result in a mutual understanding that both the occupant and the Marine Corps have fulfilled their respective responsibilities defined during check-in and pretermination inspections. Avoidance of an unreasonable "white glove" inspection is emphasized and equitable treatment of all occupants is imperative.

1231. SITUATIONS WHERE THE TERMINATION OF ASSIGNMENT TO QUARTERS IS FOR REASONS OTHER THAN PCS. Unless otherwise specified in this Manual, the installation commander should allow a reasonable period of time, normally not to exceed 30 days after notice of termination is given, whereby the service member/dependents may continue to occupy the Government quarters while making moving and resettlement arrangements. If a loss of entitlement to BAQ at the with dependents rate is involved, then an applicable "fair market rental fee" will be charged, unless otherwise specified in this Manual. Termination of quarters assignment shall normally occur:

1. When public quarters have been assigned to personnel at an installation where they are serving on temporary additional duty (TAD) orders, and it becomes necessary to use these quarters for another member legitimately entitled to them. When this is the case, it is necessary to dispossess the member assigned quarters on the basis of the TAD orders. When more than one such assignment has been made, the member serving on TAD orders who is junior in grade will be dispossessed.

2. When there is a change in the marital status upon which an individual's eligibility rests, including divorce or legal separation, as defined in MCO Pl75l.3 when dependents leave the sponsor for more than 90 days, except in cases of severe hardship as outlined in paragraph 1227, or when alleged entitlement to BAQ at the with-dependents rate is later determined to be fraudulent or erroneous.

3. Upon discharge, when the individual does not immediately reenlist.

4. Upon release from active duty or retirement. However, a reasonable period (normally not to exceed 60 days) may, at the discretion of the installation commander, be allowed for such former military personnel to vacate quarters. Occupancy will be on a rental basis. The installation commander will charge the "fair market rental value" of the housing unit. (See appendix D.) If a "fair market rental value" has not or cannot be determined, then the installation commander will charge a cost equal to the BAQ plus applicable VHA at the former service member's rate of allowances. The installation commander has the authority to approve/disapprove requests for extension beyond 60 days.

5. Upon death of sponsor. Installation commanders will allow dependents of a member of the armed forces who dies in the line of duty and whose dependents are occupying Government family housing, other than on a rental basis, on the date of the member's death, to continue to occupy such housing without charge for a period of 90 days. The dependents also have the option to retain quarters for a portion of the 90 days and collect BAQ/VHA for the balance of this period. (For example, stay in quarters for 40 days and collect 50 days Of BAQ/VHA.) Installation commanders may approve requests to remain in quarters beyond 90 days in cases of demonstrated hardship, however, this extension should not exceed 60 days and the dependents will be charged a "fair market rental value." If a "fair market rental value" has not or cannot be determined, then the installation commander will charge a cost equal to the BAQ plus applicable VHA at the former service-member's rate of allowances. Should a sponsor's death be determined to have occurred while "not in the line of duty", the installation commander may allow the dependents to continue occupying Government quarters for normally not more than 60 days at a "fair market rental value" equal to the former service member's rate of allowances.

6. When a temporary duty is completed and the military member is then detached from the installation.

7. When due to particular circumstances, such as the necessity for urgent major repair, or overhaul of quarters, and when the installation commander who assigned the quarters considers it necessary that the quarters be vacated to properly accomplish the necessary work.

8. At the discretion of the installation commander when a person requests termination and there is another person who is eligible for and desires immediate assignment to the quarters. No set of quarters should be permitted to remain vacant for an extended period for this reason.

9. When quarters are abandoned for 30 days or more excluding special retention cases.

10. In cases not covered by the foregoing, at the direction of the installation commander for just cause, including but not limited to: possession of illegal drugs and contraband, irresponsible acts, or poor behavior.

11. Military members in a confinement status. When a military member who was assigned to Government family housing is sentenced to confinement for 90 days or longer by either military or civilian authorities, entitlement to family housing will be terminated. However, the member shall retain entitlement to family housing if the members's sentence to confinement: is reversed on appeal; is reduced in any manner by the convening authority to less than 90 days (provided the sentence as approved by the convening authority does not include a reduction below the grade required to occupy the assigned quarters); or does not require the actual service of 90 or more days of post-trial confinement (after applying credit for pre-trial confinement). In these cases should the member's sentence of confinement in excess of 3 months be reversed on appeal or disapproved by the convening authority, the member shall retain entitlement to family housing. In this case, if the member has already vacated quarters, and desires to again

occupy Government family quarters, upon application by the service member, the installation commander may place the service member's name at the top of the waiting list just below the freeze zone.

a. The installation commander may authorize the member to retain quarters when the member is expected to return to useful service at the installation, or until civilian housing is available. Generally, this period will not exceed 3 months but may be extended in cases of severe hardship.

b. During any grace period before the dependents vacate family housing, the installation commander will charge the "fair market rental value" of the housing unit per appendix D of this Manual. If a "fair market rental value" has not or cannot be determined, then the installation commander will charge a cost at least equal to the BAQ plus applicable VHA at the confinees' rate of allowances.

c. A military member who is not assigned to Government quarters and is sentenced to confinement for 3 months or longer by either military or civilian authority, will not be eligible for Marine Corps family housing during the period of confinement.

## 1232. ABSENCE FROM QUARTERS

1. When sponsors are serving on TAD, deployment, or an unaccompanied tour which causes them to reside away from assigned quarters, and dependents desire to absent themselves from quarters at the same time, local installation commanders at their option may permit retention of quarters for periods not normally to exceed 90 days of nonoccupancy. Absence from quarters beyond 90 days will be authorized only in cases of extreme hardship, for humanitarian reasons, or where medical reasons are demonstrated. Requests for nonoccupancy beyond 90-days will be made in writing to the installation commander who has approval/disapproval authority. Circumstances must be of such severity as to present a personal problem that is more severe than those normally encountered by Marines and their families in the normal course of military service. The following situations are deemed worthy of favorable consideration for retention of quarters when periods exceeding 90 days of nonoccupancy are requested:

a. Illness of a member of the immediate family when the attending physician predicts a short life expectancy.

b. Illness of a member of the immediate family when it is manifest that the presence of the service member or member's spouse is necessary for the recovery, as substantiated by a statement of the attending physician.

c. Illness of spouse or child where facilities of the local installation are unable to provide necessary treatment to ensure recovery, as substantiated by the attending physician.

d. Situations which impose a severe problem on the Marine or a member of the Marine’s immediate family, the solution of which can be achieved only through the presence of the Marine or the Marine’s spouse. Housing allowances will continue to be forfeited; and for purposes of utilization reporting, installation commanders will consider the quarters occupied.

2. Installation commanders are encouraged to establish guidelines to ensure ready access to, and maintenance of, the nonoccupied Government quarters/property in question, to include the following:

a. A limited power of attorney should be provided to the installation’s housing office permitting access to quarters for required maintenance.

b. Arrangements will be made by the occupant for grounds care, etc. The name of the individual performing the service(s) will be provided to the housing office.

c. The installation’s provost marshal should be informed of the period of nonoccupancy.

d. Pets should be boarded or otherwise accommodated.

e. Delivery of mail, newspapers, etc., should be stopped or rerouted.

3. Periods of such nonoccupancy in excess of 90 days for which approval has not been granted will be considered abandonment.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 3: FAMILY HOUSING MOBILE HOME SPACE ASSIGNMENTS, OCCUPANCY, UTILIZATION, TERMINATION AND MOBILE HOME SPACE RENTAL CHARGES

## PART A: ASSIGNMENTS

### 1300. GENERAL INFORMATION

1. Personnel will apply for mobile home spaces in essentially the same manner as for family housing.

2. Mobile homes shall not be of a smaller size than 10 by 40 feet and must be in a good state of repair and appearance. The installation commander may make exceptions to this minimum size on an individual basis based on their determination that the particular mobile home provides adequate living space for the size of the family involved and meets the standard for condition and appearance. Appropriate fire and sanitation inspections of mobile homes shall be made. No mobile home will be permitted aboard a Marine Corps installation unless the unit is equipped with a smoke detector.

### 1301. MOBILE HOME SPACE ASSIGNMENTS, OCCUPANCY, UTILIZATION, AND TERMINATION

1. Personnel desiring space in the mobile home park must complete the DD Form 1746 (Application for Family Housing).

2. A single waiting list will be maintained for mobile home space assignments. Assignments will be on a first-come, first-served basis irrespective of grade or rate.

3. Prospective occupants will be advised that mobile homes should be maintained in a good state of repair and appearance and that they are subject to periodic inspection for compliance with safety and health standards.

4. Mobile home spaces are subject to the make-ready, check-in, pretermination, and termination inspections, where applicable, as discussed in section 2 of this chapter.

5. Special instructions for mobile home space should be developed at each installation and provided to occupants upon assignment of space. Regulations should cover smoke detectors, tie-down and skirting requirements, privately owned storage sheds, patios, porches, fences, parking, maintenance, services, pets, self-help, and so forth. Occupants should also be informed of the procedures governing the collection of rent, and the services which may be an additional or separate charge, such as telephone installation.

6. When military members are assigned to Government controlled mobile home spaces, within CONUS, the handling necessary to move their personally-owned home from an off-station mobile home site to the assigned Government controlled mobile home space is authorized at Government expense. A local move at the Government expense of a mobile home must be for the individual military member who personally owns that mobile home and is being assigned to a Government controlled mobile home space. When a member requests termination of the Government controlled mobile home space for personal reasons, such as a desire to occupy a civilian mobile home space in the local community, the necessary movement costs will be at the member's expense.

7. When vacating a mobile home site, the occupants will be required to correct any deficiencies noted in the pretermination inspection and leave the area ready for reoccupancy.

8. Mobile homes shall normally be moved prior to sale incident to termination of assignment to mobile home spaces, unless retention is authorized by the installation commander.

a. Such authorization might be made in the case where the mobile home is sold to another eligible military member who desires to live in that mobile home park.

b. Generally, if a member wishes to sell his mobile home in place, and this action is approved by the installation commander, the next person on the waiting list should be given the opportunity to purchase the home. Refusal to purchase the home will not affect the individual's placement on the waiting list. However, this may result in a member lower on the waiting list purchasing the home and moving into the park prior to the first individual on the list.

9. If there are no military families currently on the waiting list for mobile home spaces, a military bachelor may be assigned to the mobile home space under the same rental agreement as military families. Therefore, a second waiting list may be kept for bachelor members who desire to reside in the mobile home park. Under no circumstances should a bachelor be assigned if a military family desires to occupy a mobile home space at that base. This also applies to the regulations regarding sales of mobile homes in place.

CHAPTER 1

FAMILY HOUSING MANAGEMENT

SECTION 3: FAMILY HOUSING MOBILE HOME SPACE ASSIGNMENTS, OCCUPANCY, UTILIZATION, TERMINATION AND MOBILE HOME SPACE RENTAL CHARGES

PART B: RENTAL CHARGES

1302. GENERAL INFORMATION. Monthly rent and Charges for each space will include shelter rent (which is computed by dividing the total cost of construction by 300 as indicated below), plus charges for actual Cost of services, maintenance, improvements, repairs, utilities, and management. Collections will be effected per the tenant and landlord contractual agreement and the NAVC0MPT Manual, Volume 3.

1303. MOBILE HOME SPACE RENT AND CHARGES

1. Space Rent. The cost for construction of mobile home park facilities is to be amortized from rental charges over a period of 25 years. The cost of subsequent major repair or improvement projects must also be included in the space rent. The costs of such projects will be divided by 300 (25 years times 12 months per year) and added to the existing space rent. For a repair or improvement project costing $300 or more per space, rents will be increased when the project is completed. For less costly projects, space rent will be increased when the total accumulated cost of projects reaches a total of $300 or more per space.

2. Charges. Monthly charges will recoup the cost to the Government for utilities, services, operations, project managements, and maintenance including common grounds, streets, and other real property serving the mobile home park exclusively.

a. Utilities may be individually metered or metered at the park boundary and prorated to occupants, based on cost to the Government. If utilities are not metered, consumption may be computed by engineering estimate according to the services provided. Charges for each utility must be separately identified.

b. Installations will make a detailed review of existing charges and projected costs at least annually to ascertain their adequacy. When a rate increase has been approved, the occupant will be given a minimum of 30 day’s advance written notice prior to the effective date of the rate increase.

3. Formula for Determining Rents and Charges. The formula for determining rents and charges for mobile home spaces is provided below:

EQUATION: $\frac{a/b}{300} + \frac{C}{d}$ = monthly rent and charge

Space rent + utilities = monthly rent and charges for services, operation, maintenance, and project management

Where: a = initial cost of project plus total costs of improvement and repair projects to date

b = total number of spaces

c = cost of utilities, services, operation, maintenance, and project management 1/

d = projected average number of occupied spaces

1/ Where utility charges are metered, they will be excluded from the formula and added to other monthly rents and charges or, if billed directly to the occupant, omitted.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 4: OCCUPANT RELATIONS, RESPONSIBILITIES AND LIABILITIES

### PART A: OCCUPANT RELATIONS

1400. BACKGROUND. Occupant-related programs are designed to promote an amicable atmosphere among occupants and a close relationship between the occupants and the housing organization, to enhance the safety and welfare of the occupant, to provide for community activities, and to ensure a common flow of information. Additionally, occupants of Marine Corps family housing can reasonably expect the existence of a normal social environment into which they can bring their families. This should include the preservation of family privacy, the provision of security and protection, and the availability of community services.

1401. TYPES OF OCCUPANT RELATED PROGRAMS

1. Occupant Orientation Plan. Installations will develop and implement an occupant orientation plan. Each occupant must be thoroughly oriented to the local installation within 30 days of assignment to quarters. The occupant orientation plan should incorporate the distribution of occupant handbooks and local regulations, a self-help program indoctrination, an introduction to the local community and the services provided, and a discussion of local procedures and points of contact in the housing organization.

2. Community Associations. Community associations provide channels of communication among occupants, which may lessen the likelihood of misunderstandings, bickering, or personal or group antagonisms. The housing organization, through means such as the occupant orientation plan, should ensure the wide dissemination of information regarding the existence of local community associations or installation policies concerning their formation, so that all occupants may have the opportunity to participate. Community associations offer an important channel of communication between the installation and occupants, therefore the housing organization should maintain an active interest in association activities. A housing representative should attend association meetings to answer questions, be made aware of problems, and offer any assistance which might be requested. The formation of community associations is subject to the approval of the installation commander prior to authorization for use of any facilities provided by the Marine Corps.

3. Use of Government Facilities by Organized Groups. When permission is granted to an occupant group to use Government facilities, there must be a definitive written understanding of the nature of the activities permitted; responsibility for the custody of Government space and property; observation of fire, safety, and sanitation regulations; security; and compliance with local rules and regulations set by management.

4. Mediation of Occupant Complaints. The housing organization has the responsibility for mediating occupant complaints regarding family housing. Housing representatives must handle complaints with the strictest impartiality. Comments implying guilt or responsibility must be avoided until a thorough inquiry has been made. Complaints requiring an investigation must be made in writing, signed by the complainant, and submitted to the family housing office for initiation of appropriate action. An investigation or inquiry will not be initiated until the initial information has been received, screened, and evaluated. In instances where more than one occupant is involved, the housing representative must have an understanding of all positions. In bases which cannot be resolved among the individuals concerned, it may be advisable to discuss the problem with all the parties involved and the installation commander. Belligerent tenants who are unwilling to resolve problems and who are a continual source of conflict, disturbing the peace and harmony of the neighborhood, should be terminated from their assignment to quarters. A report of the investigation, results, and action will be made a matter of record.

5. Energy Conservation. The family housing energy conservation program is designed to reduce the consumption of energy in family housing units through the combined efforts of the occupants and the Marine Corps. Energy awareness is the responsibility of family housing occupants and the installation commanders.

6. Civil Defense. Civil defense encompasses the emergency measures to be taken for the protection of life and property in case of a natural disaster or attack by an enemy. Family housing occupants are to be aware of and understand local policies and instructions concerning civil defense measures and are to participate actively in the protection of life and property in case of an emergency. Instructions for occupant responses to natural disasters, such as earthquakes, hurricanes, and typhoons, must be in consonance with local directives and information given in the occupant handbook.

7. Self-Help. Self-help is a program which allows for the voluntary participation of family housing occupants in the maintenance and improvement of Marine Corps facilities. It is designed to enhance the environment, expedite the accomplishment of maintenance and improvements, and promote prudent homeowner attitudes among the occupants. The self-help program is explained in detail in appendix E of this Manual.

8. Publications. Publications are an excellent vehicle for transmitting information to occupants of Government housing. A family housing newsletter relating items of interest to occupants could be developed and distributed on a scheduled basis by the installation family housing organization.

# CHAPTER 1

## FAMILY HOUSING MANAGEMENT

## SECTION 4: OCCUPANT RELATIONS, RESPONSIBILITIES, AND LIABILITIES

### PART B: OCCUPANT RESPONSIBILITIES

1402. GENERAL INFORMATION. Installation commanders having Marine Corps-owned or -controlled family quarters under their Cognizance shall designate the housekeeping tasks to be performed by occupants of family public quarters. Occupants shall be responsible for those routine, recurring housekeeping tasks normally performed by tenants in private housing of similar type and value. Those tasks requiring the skill of an artisan or specialized mechanic or which are considered to involve danger shall be performed by the installation's maintenance forces or under a contract. The prospective occupant shall be informed of the occupant's responsibilities for housekeeping and services during occupancy and of the occupant's accountability for noncompliance. (See appendix F.) The occupant shall be provided with adequate instructions as to the proper care and maintenance of property and equipment placed in that person's custody during tenancy.

1403. VACATE NOTICE. Occupants must notify the housing office of intent to vacate Government quarters 60 days prior, or upon receipt of permanent change of station orders. Failure to do so could result in a delay of the final inspection and subsequent release from quarters.

1404. CLEANING. Occupants of military family housing are expected to care for the assigned unit and to keep it clean. As a minimum, occupants are responsible for cleaning the following:

1. Interior surfaces of windows.

2. Exterior surfaces of windows readily accessible from the ground.

3. Inside walls, woodwork, floors, and venetian blinds.

4. Stoves, refrigerators, ovens, sinks, tubs, toilet fixtures, washing machines, dryers, and similar household equipment.

5. Carpets, rugs, draperies, and similar items.

6. Carports, garages, storage spaces, porches, steps, walks, driveways, and exterior walls readily accessible from the ground.

1405. MINOR MAINTENANCE

1. Occupant Work. Occupants will, at a minimum, be responsible for the following.

a. Furnishing and replacing electric light bulbs and fuses.

b. Practicing good sanitary housekeeping to control pests, including rodents, and periodic spraying, using common household pesticides.

c. Replacing disposable-type furnace or air-conditioning filters.

d. Cutting, trimming, and watering the lawn adjoining the quarters.

(1) Occupants of Marine Corps family hOusing will normally have the same responsibility for grounds care as occupants of comparable civilian community housing.

(2) Grounds Care Exceptions. Exceptions for the responsibility of grounds care may be made with the specific approval of the CMC for those occupants to whom the assignment would be unreasonable. In no case will it exceed care of more than 1/2-acre; and, wherever possible, landscaping will be designed to allow mechanized maintenance by gang mowers. The assignment of gardeners to individual quarters is prohibited. Official records of the approved excepted quarters and related additional funds expended for grounds care shall be maintained at the installation for review by authorities upon request.

e. Removing snow and controlling ice formation on porches, pedestrian walkways and driveways.

f. Conservation of water and utilities.

2. Occupant Skill Consideration. In no instance will occupants be responsible for maintenance or repair beyond those tasks normally undertaken by tenants in private housing possessing minimum skills and equipped with simple handtools.

1406. ENERGY CONSERVATION. The housing manager should develop a program to achieve a significant reduction in energy consumption and coordinate it with the station’s conservation program as outlined in the family housing energy conservation handbook. The program should include but not be limited to the following measures:

1. Consumption. During the check-in inspection, the occupant shall be shown how to operate equipment in the most efficient manner and shall be advised to conserve all utilities.

2. Literature. The housing manager shall use newsletters, the installation’s newspaper and any other available means to provide up-to-date methods for reducing energy consumption.

3. Monitoring Consumption. When in the project areas, housing office personnel shall watch for unnecessary utilities consumption and notify the occupant of any discrepancies.

1407. THERMOSTAT SETTINGS. At change of occupancy, hot water tank temperatures will be checked and reset if necessary to comply with the following:

1. Those units having dishwashers will have the hot water temperature setting of 140 degrees.

2. Those units not having dishwashers will have the hot water temperature setting of 120 degrees.

1408. PEST CONTROL

1. The Government is responsible for all change of occupancy pest control measures in family quarters and will perform pest control measures during occupancy on an as-required basis in buildings housing two or more families. Occupants of such buildings are responsible for the conduct of minor pest control practices consistent with good housekeeping and sanitation.

2. The occupants of Government-owned single family dwellings are responsible for pest control measures during their occupancy.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 5: FAMILY HOUSING REFERRAL PROGRAM AND DOMESTIC LEASING PROGRAM

### PART A: GENERAL INFORMATION

1500. PURPOSE. It is Marine Corps policy to provide a personal, convenient housing referral service to assist military personnel of all services and their dependents in locating suitable off-base housing when Government-owned or controlled housing is not available. The Housing Referral Program will adhere to the policy of equal opportunity on off-base housing as outlined in MCO P5354.1 and is not intended to intrude on the normal business relations between real estate brokers, rental agents, sales agents, and their customers.

1501. PROGRAM REQUIREMENTS. The Housing Referral Program comprises the following responsibilities and functions:

1. Marine Corps installations having 500 or more assigned military personnel shall establish housing referral offices when such services are not available from a larger installation in the area. Installations with fewer than 500 assigned personnel shall provide housing referral services to the extent required and feasible and shall take full advantage of the services offered by larger installations in the area.

2. The housing referral office organization shall be staffed with permanently
assigned personnel. Each housing referral office shall offer complete referral service and a full range of related personal assistance to all personnel and their dependents who are authorized or required off-base housing, regardless of pay grade, number of years' service, or marital status. The policy of equal opportunity in off-base housing as outlined in MCO P5354.1, shall be strictly observed.

3. The housing referral office will provide current information regarding on-base and off-base housing availability, both permanent and temporary, as required to update the automated Relocation Assistance Center.

4. Civilian employees of the DoD who are transferred, or recruited for job opportunities away from their current places of residence, shall be authorized and encouraged to use the referral services at their new locations. Housing referral offices will provide the same services to DoD civilians, who so desire, as are provided military personnel.

5. Referral services shall be financed with funds in the FH,N&MC. Financial support requirements shall be estimated and included in budget requests for that fund source.

6. Installation commanders shall ensure that all personnel with PCS orders report to the housing referral office as a part of the check-in procedures prior to executing any commitment for private housing. When issuing or endorsing PCS orders, the installation commander shall include the following statement on the orders:

> "Before making any rental or lease agreement or purchasing a home, you shall report to the local housing referral office which has the responsibility for providing housing referral services to the installation to which you are assigned."

7. Personnel on temporary duty who elect to reside in off-base housing at their own expense will be provided housing referral services in the same manner as personnel on PCS orders. Paragraph 1501.5 also applies in such cases.

8. Every effort shall be made to obtain the maximum number of available suitable listings of property within the commuting area. A system will be developed and used by the housing referral office which will ensure that the entire area of responsibility is physically surveyed by housing referral personnel at least semi-annually. Continuous liaison with real estate interests and community agencies concerned shall be maintained to inform them of military housing needs, encourage open housing for military personnel, and stay abreast of housing activity in the community and the community services available. In addition, liaison should be maintained with other Government agencies regarding the availability of housing assets to satisfy DoD housing needs; housing listings should be exchanged with other installation housing referral offices.

9. Before referring prospective tenants, available dwelling units for rent or sale should be verified and a clear understanding reached with owners or managers as to current rental policies, practices, and rates. Information as to the race of prospective tenants shall not be provided to owners or managers.

10. A point of contact should be provided so that conflicts, if any, between landlords and DoD tenants can be resolved.

11. Housing offices providing housing referral services should be located in a building that is accessible to, and useable by, physically disabled persons. If this is not feasible, or if modification of a facility would be an undue hardship, arrangements will be made, upon request, to provide all services in an accessible location to meet the needs of the physically handicapped.

## 1502. JOINT AND COORDINATED HOUSING REFERRAL OFFICES

1. Joint Referral Offices. Where two or more military installations depend on the same community housing support, a single (joint) referral office should be operated to avoid duplication and overlapping of referral services in the area.

The office should be situated so as to create a minimum of personal inconvenience and maximum effectiveness. A joint referral office may be manned jointly, or as locally agreed; however, one installation shall be responsible for all functions and responsibilities. The CG MCB, Camp Pendleton, shall operate housing referral offices for the Naval Weapons Station, Fallbrook.

2. Coordinated Referral Officer

a. When two or more military installations depend on the same community housing support and a single (joint) office is not feasible, one installation shall act as the central coordinator and shall be the prime contact between the military and community, State, and Federal officials. A coordinated office may be operated in one of the following ways:

(1) The geographic area between the installations may be divided to permit each installation commander to perform all of the functions and responsibilities of a referral office for their part of the area.

(2) The central coordinator may be operated similarly to a joint office, being responsible for all referral functions, including obtaining and disseminating consolidated listings to other offices acting either as branches of the central coordinating office or as a separate office. In either case, the central coordinator will act as the prime contact and will provide consolidated referral information to each office.

b. The following installation commanders shall be central coordinators for other listed military installations:

(l) CG MCRD/ERR, Parris Island, South Carolina for: MCAS, Beaufort, South Carolina.

(2) Commanding Officer, MCAS, Yuma, Arizona for: United States Army, Yuma Proving Ground.

c. The Housing Manager, Marine Corps Housing Facility, Richards-Gebaur, Missouri, shall operate a housing referral service for all DoD personnel in the Kansas City area. This function shall come under the general cognizance of the Commanding Officer, Marine Corps Support Activity (MCSA), Kansas City, Missouri.

d. The housing referral office at the Public Works Center, San Diego, will serve as central coordinator and will provide housing referral services for the MCRD/WRR, San Diego, California.

e. The Family Housing Office, MCLB, Barstow, California, will be responsible for providing referral service by receiving consolidated referral information from the central coordinator and by counseling and referring its own applicants. The Army, Fort Irwin, will act as central coordinator in Barstow.

1503. HOUSING REFERRAL SERVICES. As a minimum, the installation should offer the following family housing referral services.

a. Nondiscriminatory listings of rental and for-sale housing.

b. Counseling for applicants on the Equal Opportunity in Off-Base Housing Program.

c. Vacancy status of as many listings as possible.

d. Assistance in resolving tenant/landlord disputes.

e. Preliminary inquiries to validate housing discrimination complaints.

f. Liaison with community and Government officials and organizations.

g. Housing data exchange with other DoD housing offices.

h. Transportation to inspect community housing when public transportation is not convenient.

i. Assistance with rental negotiations and review of leases.

j. Assistance with understanding procedures and resolving problems with utility connections, fees, deposits, and billings.

k. Language interpretation in dealing with landlords.

l. Rental agreements in English and the national language in foreign areas.

m. Entitlement briefings and certification of housing related costs for temporary lodging allowances and overseas housing allowances in foreign areas.

1504. COMMANDER'S RESPONSIBILITY

1. Installation commanders of Marine Corps activities with Marine Corps managed family housing, except those noted in paragraph 1502 as under the housing referral cognizance of another housing referral office, shall establish and operate housing referral as prescribed in this chapter.

2. Where housing referral services are available, they will be provided to bachelor as well as married personnel.

PART B: HOUSING REFERRAL OFFICE PROCEDURES

1505. HOUSING LISTINGS

1. Three separate lists shall be maintained by the housing referral office:

a. Listed Facility. A suitable facility listed with the housing referral office as available to DoD personnel without regard to race, color, religion, national origin, or sex. (See paragraph 1506.)

b. Restrictive Sanctions. Facilities which have been found by the installation commander, per MCO P5354.1, to discriminate against DoD personnel. The DoD personnel shall not enter into a new rental, lease, or purchase arrangement for or otherwise move into such facilities. Restrictive sanctions are effective against the agent and the facility and remain in effect a minimum of 180 days prior to command review.

c. Nonapproved List. Those units which, as determined by the installation commander, are not considered desirable for occupancy by military personnel. Conditions which determine a unit's undesirability are generally those of the adequacy standards contained in this Manual. However, other conditions may, in the eyes of the installation commander, also determine a unit's undesirability.

2. Separate rental and sales listing of housing units, including shares, sublets, transient quarters, and trailer courts, shall be obtained from owners, their representatives, or real estate agents.

a. Detailed information should be obtained for those listings which owners wish to place on the referral list. These listings should provide information regarding the number of bedrooms, bathrooms, style of house, and list any amenities. These listings should be used by the housing referral office to assist families in locating adequate, affordable off-base housing.

b. The information provided by the listing should be reviewed at least annually to ensure it is still valid.

c. The housing office should request those listing homes on the referral (whether handled by the owner, agent, manager or agent) to notify the housing office when they have rented the unit or it is no longer available for rent.

1506. ASSURANCE OF AVAILABILITY TO ALL MILITARY PERSONNEL. Personnel wishing to list rental and sales units will be informed of the equal opportunity housing

policy. Only rental and sales units which are available to all DoD military and civilian personnel regardless of race, color, religion, national origin, or sex will be listed in the housing office.

## 1507. HOUSING REFERRAL COUNSELING AND ASSISTANCE

1. All personnel reporting to the housing referral office will be informed of any restrictive sanctions the command has imposed and provided a list Of restricted facilities. Each member shall be informed they are not authorized to rent or lease a housing unit which is on the restrictive sanction list and would take specified risks when renting or leasing a unit on the nonapproved list. The command should obtain the member’s signature on a statement indicating they have been counseled on the restrictive list and have been provided a list of all restricted facilities.

2. If an individual does not desire assistance, they should sign a statement to that effect. If the member requests assistance, they should be provided with thee following:

a. A complete file or list of rentals or sales offerings in the size, location and price range which the applicant has indicated shall be made available to him/her.

b. Assistance in locating, by mapping the listing the member has chosen. When appropriate, the map should be annotated denoting high crime areas as well as those areas restricted for reasons of discrimination and sanitation. Each applicant shall be offered a class A telephone to check selected listings to ensure their availability. When telephone verifications are made, a record shall be maintained.

c. Written guidelines covering standards of conduct for military personnel residing off the base which are contained in DoD Form FS-46 (The Military Tenant) (NAVMC 2673). The member shall be tactfully counseled concerning these standards of conduct when occupying non-Government housing and of the availability of assistance in resolving complaints with landlords, tenants’ rights, the desirability of inclusion of a military release clause in all rental contracts, and the availability of legal assistance in the review of proposed leases and sales contracts to protect the interests of military personnel.

## 1508. HOUSING REFERRAL RESPONSIBILITIES

1. Geographic Area Information. Each referral office shall compile information concerning schools (public, private, and parochial), shopping areas, recreational facilities, transportation, churches, emergency services, and other community facilities and services in the geographic area and shall assemble this information as handout material to personnel seeking off-base housing.

2. Complaints. Discrimination complaints in-off-base housing will be handled per the instruction outlined in MCO P5354.l. Complaints of off-base housing problems, other than discrimination, from military personnel or from owners and managers of off-base housing facilities, must be immediately investigated for validity. When possible, complaints shall be made to, and adjudicated by, the housing referral office. When complaints are of a serious nature or when there are indications that the command should become involved, the facts shall be reported to the installation commander for further investigation or necessary action.

3. Inspections. Inspection of rental property is for the protection of the military family moving into the community. Property should be inspected when there is a reason to question the suitability of housing based on environmental conditions, including health and safety considerations. Inspections shall also be made of restrictive sanctioned facilities to be sure that no military members have occupied them since the sanction was imposed. When, in the opinion of the command, housing is unsuitable for occupancy of military families, it may be removed as a listing or not accepted for listing.

4. Community Liaison. Continuous liaison with local community officials and organizations which have an interest in community housing in their geographic area should be maintained. Every effort shall be made to publicize the need for military family housing in the community on the basis of availability to all military personnel. Contacts should include, but not be limited to, real estate boards, fair housing boards, and representatives of the FHA and VA.

5. Department of Housing and Urban Development (HUD) Low Income Rent Subsidy (Section 8) Housing. Local Public Housing Authorities (PHA’s) have total cognizance over administration of the portion of the 1974 Housing Act pertaining to low-income, rent-subsidy housing. This portion of the Act known as "Section 8"; and, while it replaced previous legislation known as "HUD" 236 housing, Section 8 contains no provisions for military preference housing (MPH) as in the previous laws.

6. Approval of and Solicitation for Advertising. Consistent with established command procedures, housing referral offices shall assist, as required, to insure that no advertising or discriminatory rental or sales property appears in official media controlled by the command. Installation commanders will comply with the prior approval procedures of the Federal Acquisition Regulation, 4-803, before entering into any agreements for paid advertising which are soliciting listings for the housing referral office in newspapers, trade journals, and similar publications. Requests for such advertising will be forwarded to the CMC (LF) on DD Form 1535 (Request/Approval for Authority to Advertise).

1509. HOURS OF OPERATIONS. Hours of operation of the housing referral office should be established to meet the needs of, and provide convenience for,

military families who desire assistance in obtaining suitable off-base housing. The hours of operation should be widely publicized in order that personnel will know when the service is available. During hours when the office is not open, arrangements will be made (e.g., duty officer) to furnish sufficient housing referral information.

## 1510. STANDARDS OF CONDUCT

1. All military and civilian personnel assigned to, attached to, or employed in the housing referral office are cautioned to have no business association or financial interests which might give rise to any suspicion of partiality.

2. All military and civilian personnel connected with housing referral office activities are cautioned to avoid any action, whether or not specifically prohibited, which might result in or create the appearance of:

a. Using public office for private gain.

b. Giving preferential treatment to any person or housing facility.

c. Making a Government policy decision outside official channels.

d. Affecting adversely the confidence of the public in the integrity of the Government.

# CHAPTER l
# FAMILY HOUSING MANAGEMENT

## SECTION 5: FAMILY HOUSING REFERRAL PROGRAM AND DOMESTIC LEASING PROGRAM

## PART C: THE FAMILY HOUSING DOMESTIC LEASING PROGRAM

### 1511. GENERAL INFORMATION

1. The Marine Corps is authorized to lease housing facilities for assignment, without rental charge, as family housing to eligible military personnel. Leasing is authorized at or near a military installation if there is a substantiated shortage of adequate housing at or near the installation and one of the following conditions is met:

a. The requirement is temporary.

b. Leasing would be more cost-effective than construction or acquisition of new housing.

c. Family housing is required for personnel attending service school academic courses on permanent change of station orders.

d. Construction of family housing at such installation has been authorized by law but not yet completed.

e. A military construction authorization bill pending in Congress includes a request for authorization of construction of family housing at the installation.

2. Approval authority for domestic leased family housing is vested in the CMC. However, the Commander, NAVFACENGCOM, executes and will provide technical expertise to the Marine Corps with appropriate reimbursement for manpower, administrative, and overhead costs.

### 1512. DOMESTIC LEASING POLICY

1. In support of the CMC objective to assure that the military have adequate, affordable housing for their families, privately owned family housing may be leased. Eligibility is restricted to those military members who are accompanied by dependents and thereby entitled to BAQ at the with dependent rate.

2. Leased units shall be operated as public quarters for eligible personnel and their dependents.

3. Statutory lease cost limitations will be published by separate correspondence and shall not be exceeded. Total charges, including utilities

(excluding telephone service), maintenance, and operating costs, shall not exceed the statutory maximum per month for any one unit.

4. The travel time from the leased housing to the normal place of duty by privately owned vehicle must be no more than one hour during normal rush hours.

5. The units leased must be located in residential areas meeting acceptable standards for health and sanitation; free of offensive fumes, industrial noises and other objectionable features.

6. The leased unit shall meet the bedroom requirements which will accommodate the family composition of the occupant.

7. Block leasing of two or more units of single ownership is authorized providing each individual unit is specifically identified, the amount of the monthly rent is specifically quoted for each unit, and the Government reserves the right of termination of any unit or units, together with a corresponding reduction in the amount of the total monthly rental payable under the contract.

8. All family housing leased under this program shall be available for use as public quarters by military personnel regardless of race, color, sex, creed, or national origin. This policy shall be clearly stated to all prospective landlords prior to execution of leases.

9. Consideration shall be given to leasing repossessed property insured by the Federal Housing Administration (FHA) or Veteran's Administration (VA), if available at locations where leasing is authorized.

lO. The leasing program is subject to annual changes in criteria by the Congress and in quotas and maximum allowable housing costs (MAHC) by the Office of the Secretary of Defense. Accordingly, there may be occasions when the CMC must cancel leases at certain locations because of new, more restrictive criteria or reduced quota. If this occurs, the program must be brought within the new criteria or quota in a logical and orderly manner and not through an arbitrary cancellation of leases or eviction of occupants prior to completion of their current tours of duty. Reductions in the number of units under lease must be by attrition (canceling leases when the current occupant is transferred on PCS orders).

## 1513. PROGRAMMING

1. The quota available to the Marine Corps each fiscal year depends on the total number of lease points authorized by Congress for the DoD and on the allocations made by the Office of the Secretary of Defense to the military departments. The Marine Corps allocation is specified within the Department of the Navy quota. Quotas within the Marine Corps are determined by the CMC. Requests for changes in the assigned lease quotas shall be submitted, as necessary, to the CMC.

2. A requirement for leased family housing must be substantiated by a completed market analysis depicting need.

3. Quotas, 25 or less in number, may be shifted within the 4thMarDiv, 4thMAW or MCD's between previously approved locations. For those locations presently without approved quotas, a completed personnel data sheet which justifies leasing must be submitted prior to the execution of a lease for that location.

1514. FUNDING. Funding for leasing under this program is authorized by the Congress in the FH,N&MC.

1515. RESPONSIBILITIES OF COMMANDERS/DIRECTORS OF INSTALLATIONS HAVING LEASE QUOTAS

1. Prior approval of the CMC is required for leasing family housing quarters.

2. Control lease costs (rent plus utilities) to remain within the designated statutory maximum ceiling.

3. Assign leased family housing in writing only to eligible Marine personnel.

4. Maintain appropriate market analysis for each location where leasing has been authorized.

5. Forward to the CMC (LFF) the following:

a. A copy of any correspondence concerning leasing which is not considered to be routine.

b. Current copies of domestic leased housing management documents, in duplicate, as well as duplicate copies of all changes thereto.

6. All unused lease points may be reallocated by the CMC at any time.

1516. ADMINISTRATION

1. Leasing Units in Single Ownership. As a rule, the entire quota for leasing units authorized an installation should not be executed for units from a single owner.

2. Negotiation of Leases. EFD's are responsible for negotiating, executing, administering, and terminating leases. Negotiations will be conducted by the EFD after reviewing requests and recommendations of the cognizant Marine Corps commanders/directors. An EFD representative will ascertain that the rental consideration cited is fair and reasonable, conduct negotiations, obtain signature of the lessor or authorized representative thereof, and will have the lease executed on behalf of the Government. The EFD representative will prepare

a condition report for each housing unit and will take all further actions necessary relating to the administration of the lease.

3. Leasing for Dependents of Members of Unaccompanied Overseas Tours. Leased quarters may not be occupied by unaccompanied families. Families residing in leased quarters when the sponsor departs on an unaccompanied tour may remain in leased quarters for a period of time not to exceed 60 days from the date of the sponsor's departure or until the expiration of the lease, whichever occurs first. Waivers will generally not be granted by the CMC.

4. Conversion of Occupant Leases to Marine Corps Leases. Conversion of a member-leased unit to a Marine Corps lease is permissible and desirable where the occupant eligible for public quarters, the dwelling unit meets the standards of adequacy, then the lease costs including utilities, etc., exceeds the occupant's MAHC, and the units can be leased within the prescribed dollar limits.

5. Leasing of FHA or VA Properties. The FHA and VA have given assurance that leases to the military departments under this program, covering single family units, will be continued during the tours of military occupants. If they desire to withdraw any units in order to proceed with a sales program, the leases will be phased out as the occupants are transferred to other areas. The FHA has also assured the continuation of military occupancy of leased units in multifamily structures during a tour of duty even if the property is sold.

6. Terms of Lease Agreements. The initial lease term shall be restricted to the fiscal year within which the lease is executed. Automatic renewal privileges are not authorized. Funding for the leasing program flows solely from annual FHMA,N&MC appropriations with no "carry-over' authority to use any unobligated funds in a follow-on fiscal year. It is beneficial to the Government (Marine Corps) to include a provision in a lease giving the Government the right to terminate when the property is no longer needed. The usual period for providing notice of termination by the Government (Marine Corps) is 30 days. The approval of the CMC must be obtained before a provision may be included in the lease contract for a Government (Marine Corps) termination notice period in excess of 90 days.

7. Termination of Leased Units. When leases cannot be revalidated for continuation, they will be canceled upon termination of the current occupant's tour of duty, within the contract terms of the lease. Also, if vacant unit(s) cannot be occupied by eligible personnel assigned to the installation for which leasing was authorized, the lease contract shall be canceled at the earliest date permitted under the terms of the contract.

8. Utilization. Full utilization of leased units is required to avoid losses to the Government. During a normal change of occupancy, a unit should not remain vacant for more than 2 workdays. However, if complete interior painting, floor refinishing or a major repair is required, 3 to 4 days may be justified.

9. Management Operations. Except as otherwise stated in this Chapter, assignment, occupancy, and termination policies and procedures, including inspeCtions in connection therewith, are the same for leased housing as for all other public quarters. However, in addition to those instructions on occupant responsibility given to all occupants of public quarters, those terms of the lease relating to occupant responsibility should be made the subject of a special brochure to be given to each occupant upon being assigned to a leased unit. Also, as a minimum, there should be incorporated advice to the occupant concerning the following:

a. Conservation of Utilities. The occupant should be advised that, because of statutory limitation on costs, excessive utilities consumption could result in contract charges increasing the lease cost to the statutory lease cost ceiling, possibly resulting in cancellation.

b. Agreements Between Occupant and Landlord. No unilateral agreements between occupant and landlord are permitted. The occupant must understand that in all matters concerning the leased quarters, they must deal with the Government unless specifically advised otherwise. Problems with landlords or their representatives in this regard shall be immediately reported to the local commanding officer/officer in charge. Once a Government lease has been executed with an effective date, no money transactions will occur between the lessor and the occupant. Both parties will be informed of this prohibition prior to execution of the lease.

10. Liability for Loss and Damage. Under the lease, the Government is responsible for loss or damage beyond normal wear and tear caused by the occupant. However, the occupant may be given the opportunity to replace or repair the property or reimburse the Government for the repair or replacement. Further, the occupant may be prosecuted under the Uniform Code of Military Justice for damage to Government property. The commanding officer of an installation having cognizance of housing shall ensure prospective occupants of leased quarters are advised of their responsibilities and liabilities as are occupants of base housing. The commanding officer will also ensure action is initiated to collect all claims for reimbursement for damage or loss to leased quarters on a voluntary basis when necessary. Guidance regarding liability of occupants of public quarters (base quarters or leased units) is addressed in appendix F.

a. A voluntary consent to checkage of pay can be obtained only after it has been established that the occupant should be held responsible for loss or damage.

b. When military personnel do not voluntarily consent to checkage or otherwise make payment for damage or loss, the matter will be referred to the Judge Advocate General.

c. Military personnel occupying public quarters may file claims with the Secretary of the Navy for any loss or damage affecting their personal property located at such quarters, provided such loss or damage is not caused by the occupant's own negligence. Entitlement to payments is subject to certain exceptions generally covered in most commercial homeowners insurance policies. Occupants of leased quarters should be advised or reminded that they are exempt from coverage and encouraged to make their own arrangements for personal property insurance.

11. Inventory and Occupancy Reports. Information concerning family housing inventory and occupancy reports is contained in appendix C. Copies of reports required are only to be submitted to the Commandant of the Marine Corps in cases of leasing at installations having Government-owned family housing.

1517. MOVEMENT OF HOUSEHOLD GOODS. The policy governing the cost of moving a member's household goods is the same for leased public quarters as for any other public quarters. The FHMA,N&MC will not be charged.

# CHAPTER l

# FAMILY HOUSING MANAGEMENT

## SECTION 6: FAMILY HOUSING BUDGETING AND FINANCIAL MANAGEMENT

## PART A: GENERAL POLICY

### 1600. BUDGETING

1. General Information. The annual family housing operation and maintenance budget must reflect accurate requirements, properly planned distribution of the resources requested, and fully documented justification. The primary data sources for the budget preparation shall be historical data, updated history files, deficiency listings, short- and long-range maintenance plans, and family housing maintenance and repair deficiencies. Budgets will be prepared and submitted per guidance contained in MCO P7100.8 and field budget guidance bulletins in the 7100 series.

2. Responsibilities. The installation commander is responsible for the preparation of the family housing operation and maintenance budget. Normally, this task is delegated to the housing manager/ officer who acts as the final coordinator for the budget. When so, the manager should be prepared to defend all budget estimates, including the short- and long-range maintenance plans and all deficiencies.

3. Obligations. The appropriate family housing account funds will be expended exclusively for family housing program requirements. Family housing expenditures must be authorized by the installation commander, the field activity housing manager, or the CMC (LFF-3), prior to fund obligation. Current year appropriated funds expended will be applied to the same functional accounts for which they are budgeted. Prior year funds can only be expended for changes to service or maintenance contracts obligated in that fiscal year. Guidance on change order to maintenance accounts is contained in chapter l, section 8 of this Manual. The installation commander has the authority to realign prior year funds within all operations and maintenance budget projects. Prior year subaccount realignments are not restricted.

### 1601. FAMILY HOUSING. NAVY AND MARINE CORPS ACCOUNT (FH.N&MC)

1. The FH,N&MC is the uniform account system or structure used by the DoD as the management vehicle for financing all family housing programs. The FH,N&MC includes funds for new construction, post acquisition construction design, debt payment, leasing, operation, and maintenance provided through the annual Military Construction Appropriation Act. The FHMA has two basic types of funds:

a. Multiyear Funds (5 years)--construction, improvements and design.

b. Funds in an annual account which expire on 30 September each year--Family Housing account operation and maintenance (O&M).

2. Family housing costs will be programmed, budgeted, and accounted for by-the DoD Component having responsibility for the installation's housing, regardless of the occupants' service affiliation. Marine Corps family housing will neither remit reimbursements to, nor receive reimbursements from, other DoD components for occupancy of Government family housing by members of a DoD component other than that providing the quarters. The uniform account structure used in programming, budgeting, and financing is designed to:

a. Maintain separate financial subaccounts for:

(1) Construction, post acquisition construction and design.

(2) Debt Payments.

(3) Operation and maintenance, and leasing.

b. Provide for program and financial administration.

c. Provide controls to ensure that FHMA funds are used only for the purposes for which they are appropriated.

3. Budget Projects (BP's). Financial subaccounts are subdivided into BP's for administrative purposes; i.e., funding and management control of specific family housing programs. The following paragraphs depict the BP's in the O&M account.

a. Budget Project 11 (BP-11). The management, direct costs of the family housing office; indirect administrative support; programming, studies, housing referral services, training, travel, and management.

b. Budget Project 12 (BP-12). Furnishings, to include control, moving, handling, maintenance, repair, replacement, and initial issue. (See appendix H.)

c. Budget Project 13 (BP-13). Services, to include refuse collection and disposal, fire and police protection, pest control, custodial, snow removal, and street cleaning.

d. Budget Project 15 (BP-15). Family housing utility costs.

e. Budget Project 16 (BP-16). Family housing leasing costs.

f. Budget Project 21 (BP-21). Family housing recurring maintenance and repair.

g. Budget Project 22 (BP-22). Family housing projects (major and minor).

h. Budget Project 23 (BP-23). Family housing alterations and additions.

i. Budget Project 96 (BP-96). FHMA funded Costs of work or services provided occupants of military family housing or mobile home parks for which reimbursements to be utilized within the FHMA account will be realized.

j. Budget Project 99 (BP-99). Foreign currency fluctuations.

1602. REIMBURSEMENTS. Collections from individuals or organizations in connection with the family housing program are separated into two elements: (1) reimbursements utilized to finance family housing expenses, and (2) collections to treasury miscellaneous receipts. NAVCOMPT Manual, volume 3, includes specific collections and deposit guidance.

1. Reimbursements Used to Finance Family Housing Expenses. Reimbursements to the FHMA will be made to the annual transfer account at the installation level, and include the following:

a. Proceeds received from sale of utilities and services furnished tenants occupying housing on a cash rental basis, including mobile homes and mobile home spaces.

b. Charges for locating or removing privately owned mobile homes on or from Government owned mobile home spaces, and charges for hooking up and disconnecting utility service when accomplished by the Government.

c. Proceeds from reimbursable work or services performed for the convenience of occupants of Government quarters (excluding authorized transfer from one unit to another).

d. Operation and maintenance charges levied against non-DoD agencies sponsoring an occupant of Marine Corps family housing; e.g., Coast Guard personnel.

e. Net proceeds from handling and disposal of excess family housing.

2. Collections to Treasury Miscellaneous Receipts. Such collections generally include all reimbursements for family housing rents or services other than those described in the preceding paragraph, specifically including the following:

a. Earned rentals of family housing property (shelter rent).

b. Collections to cover costs of restoration of loss or damage to family housing facilities caused by occupants.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 6: FAMILY HOUSING BUDGETING AND FINANCIAL MANAGEMENT

## PART B: PLANNING, PROGRAMMING, AND BUDGETING

1603. GENERAL INFORMATION. Financial management within family housing is a continuing, cyclical process integral to the overall management of the family housing program. This process requires early identification of desired goals, objeCtives, and products (planning); determination of priorities for these various products and formation of a more specific approach for accomplishment (programming); and the translation of these programs into a financial plan, specifying resource requirements (budgeting). These planning, programming, and budgeting functions, together with execution, reporting, and review form the elements of the family housing financial management cycle which must be performed by each installation.

1604. PLANNING. Planning is the initial step in the financial management process. Each element requires somewhat different planning considerations.

1. 0perations. Operations planning consists of the identification of the appropriate level of service or support to be undertaken in each of the major functional areas; i.e., management, services, utilities, and furnishings.

a. Planning considerations for the management area include, but are not limited to, conformance with authorized staffing criteria; potential civilianization of any military billets; extent of referral services to be provided; potential facilities service contract initiatives which will impact upon housing office responsibilities for quality assurance evaluation; or labor saving investments, such as word processing equipment; includes training, travel, market analysis, and plans and studies.

b. Planning for services should include an examination of each type of service provided and a determination of the optimal level of support; for instance, proper frequency of trash removal, sufficient entomological protectiOn, and adequate provision of police and fire protection.

c. Planning for utilities should be directed to ensure that, as a minimum, mandated energy conservation goals are realized. This requires a detailed examination of various means of achieving consumption decreases (some of which affect planning in other program areas) such as energy conservation, investments, examination of the feasibility of alternative energy sources, and implementation of aggressive energy awareness programs for family housing occupants.

d. Planning for furnishings should include a replacement inventory of stoves and refrigerators.

2. Maintenance. Maintenance planning will include management cost associated with the maintenance program, such as salaries, transportation, comprehensive inspections, historical data, and a knowledge of the physical condition of the facilities. Chapter l, section 7 of this Manual includes specific guidance regarding planning considerations for maintenance management.

1605. PROGRAMMING. Once the planning phase has identified the desired goals and objectives of each facet of family housing O&M (i.e., where are we going?), the programming phase requires that these various ends be integrated by priority with other installation programs into a specific approach for accomplishment (i.e., how do we get there?).

1. Operations. Formulation of operations programs is concerned with the development of specific remedies for deficiencies identified in the planning process.

a. In the management area this will involve identifying staffing implications of the assessment of the functional responsibilities of the housing office; formulation of a schedule for civilianization of military billets; identifying and quantifying the support, direct or indirect, which may be received from other installation offices, such as comptroller, maintenance control, etc; and programming management initiatives which are undertaken in housing referral or other areas.

b. Programming for furnishings should consider the purchase of movable equipment (such as, stoves and refrigerators), moving and handling, repair of existing inventory, furnishings for students, and the official entertainment areas of GOQ.

c. Programming for services should consider quality, quantity, frequency, and source of those services required in family housing and identified in the planning process.

d. Utilities programming will identify annual energy consumption decreases which must be achieved to reach mandatory conservation goals with a specific plan for how those consumption decreases will be achieved. Programs must include assessment of conservation to be realized annually from energy conservation investments, improved administrative procedures, and programs to enhance voluntary occupant conservation. Necessarily, utilities programming takes into account initiatives in the management and maintenance areas relating to energy conservation.

2. Maintenance. Maintenance programming coincides with the formulation of the short- and long-range maintenance plans. These plans depict requirements and methods of accomplishment and identify whether work will be performed by contract, station forces, or some combination thereof.

3. Reimbursements. Programming for reimbursable collections should consider housing inventory, to include mobile homes.

1606. BUDGETING. Budget estimates, in consonance with the biennial budget years, will be prepared for the following fiscal years:

Current Year -- the Operating fiscal year which began last 1 October and ends next 30 September

Budget Year -- the fiscal year which starts next 1 October and ends the following 30 September, and for which funds are being requested

Budget Year + 1 -- the fiscal year following the budget year

1. If the planning and programming functions have been properly accomplished, budgeting becomes a matter of pricing a previously formulated program in each functional area. It also includes preparation of various budget exhibits which serve to justify the funds requested. Budget estimates should be based on actual current year obligations, increased housing inventory, and financial limitations as identified by CMC (LFF-3). The installation commander is responsible for accurate budget forecasts.

2. The importance of accurate budget forecasts for the budget year is readily apparent; it is used as the basis for funding decisions. However, the importance of accurate budget year + l estimates are less readily recognized. They form the basis for the preparation and justification of budget requests for the DON family housing budget submission through the DoD and Congressional budget processes.

3. The budget should function as both a planning document and evaluation tool for funding execution. As a planning document, the approved funding allocation compared to the funding requirements identified in the budget becomes a formalized financial plan to aid in the prioritization of goals and objectives within the prescribed limitations. As an evaluation tool, it provides a basis for comparing execution to plan, as well as, a historical data tool for further budget submissions.

## PART C: BUDGET EXECUTION, FINANCIAL REPORTING AND EXECUTION REVIEW

### 1607. GENERAL INFORMATION

The housing manager is responsible to the installation commander for authorizing all obligations of the FH,N&MC operation and maintenance funds. An accounting system should be maintained by budget project by fiscal quarter to preclude over obligation or over expenditure. Completed work tickets, job orders, cost reports, master job order numbers, reports, and NAVCOMPT Forms 2025 should be reviewed for accuracy and compared to the approved budget to gauge performance and ensure accomplishment of planned work. In this regard, the manager should perform spot checks periodically to ensure that work is performed as charged, time charged is accurate, and the quality of workmanship and materials meets specifications. The Status of Funds Report should be submitted to the CMC (LFF) annually by 3l October. Use the format shown in figure 1-3. Report Control Symbol MC-11101-21 has been assigned to this report.

1608. BUDGET EXECUTION. The translation of the planning, programming, and budgeting into an executed program demands the daily attention of the housing management organization. Analysis and interpretation of variances between the budget and actual obligations and costs is essential and will indicate whether variances are due to poor planning, unforeseen circumstances, or inadequate program execution.

1. Allocation of Funds. Allocations of funds are based upon the installation’s historical obligations status, funding requirements submitted in the budget and the congressionally approved Marine Corps Family Housing Appropriation. All unfunded requirements and excess funds allotted should be identified to the CMC (LFF-3) by written correspondence.

a. Allotments. Allotments are authorizations issued by CMC to installations to incur obligations within specified amounts pursuant to an appropriation or other statutory provision. The granting of an allotment reduces the available balance of the appropriation but does not constitute an obligation. Funds authorized by allotment are available for use only during the availability for obligation period, usually during the initial fiscal year of the appropriation. Funds authorized for the FHMA,MC are allotted by CMC to the installations by use of official correspondence. This action is confirmed by the issuance of a NAVCOMPT Form 372, Allotment/Suballotment Authorization. The quarterly authorization will be picked up by the allottee on the first day of each quarter per NAVCOMPT Manual, volume 2, chapter 3. FHMA,D funds for improvements, minor construction, and planning are also allocated by CMC to installations via COMNAVFACENGCOM by use of official correspondence. These actions are then confirmed by including the allocation in the authorization accounting system and issuing a NAVFAC Form 7300/7, Allocation of Funds.

Report Symbol: MC-11101-21

Status of Funds Report

| Unobligated Funds As of 31 Aug | Projected Obligations 1 Through 30 Sep | Balance Excess/(Deficit) |
|---|---|---|
| BP 11 (Management) | | |
| BP 12 (Furnishings) | | |
| BP 13 (Services) | | |
| BP 15 (Utilities) | | |
| BP 21 (Recurring Maintenance and Repair) | | |
| BP 22 (Major Repair and Maintenance) | | |
| BP 23 (Alterations and Additions) | | |
| BP 96 (Reimbursable) | | |

Figure 1-3. --Status of Funds Report.

b. Realignments. Realignments of current fiscal year funds between budget projects (BP's), except maintenance (BP 21-23) are accomplished by CMC (LFF-3). Installations can request realignment of funds by forwarding a request in written form to CMC (LFF-3) with rationale for the request. Installation commanders have the authority to realign prior year unobligated funds for maintenance change orders for projects obligated for that fiscal year and/or outstanding charges and expenditures incurred during the obligational fiscal year.

c. Project Orders. Project Orders, NAVCOMPT Form 2053, are specific orders placed for the manufacture of materials or performance of work or services. Project orders serve to obligate appropriations. A project order is a legal obligation after acceptance by the performing installation. Funds authorized by this means are available for use until completion of the project or expiration of appropriation, whichever occurs first. An installation accepting a project order must be substantially in a position to perform the work, per the NAVCOMPT Manual, volume 2, chapter 3. Processing is per procedures outlined in the NAVCOMPT Manual, volume 3, chapter 5.

2. Funding Adjustments. Adjustments can be requested in the form of a message, NAVGRAM or letter for requirements due to emergency or disaster, or reevaluation of requirements. Adjustments must be submitted with justification to

the CMC (LFF-3). Written requests are recommended to maintain appropriate audit trails. The installation will treat amended funding document in the same manner as initial authorizations. Increases or decreases to funding authorizations are issued in the same manner as the initial allocation for the fiscal year.

3. Mid-Year Review. To ensure efficient utilization of available resources, adjust for unbudgeted rate and price changes, and accommodate unplanned circumstances, an annual midyear review of family housing budget execution is due March 15, each year. The midyear review is not to be used as a vehicle for submitting major program changes to approved budgets. Justification material submitted with midyear review requests must describe each requested adjustment at "budget submission" level of detail; that is, the justification should serve to adequately describe each requested adjustment.

4. End of Fiscal Year Execution Management. FHMA operation and maintenance funds are provided under an annual appropriation and are available for obligation for a period of l year. Accordingly, funds not obligated by 30 september lapse. Family housing operation and maintenance funds will be obligated for valid requirements during the fiscal year for which appropriated.

a. Each installation should develop and maintain an "unfunded requirements" list. Equipment procurement and repair projects "on-the-shelf" and ready for advertisement are examples of this kind of management foresight.

## 1609. FINANCIAL REPORTING

1. Installation Reports. The four financial reports which describe the installation’s utilization of family housing funds received are as follows:

a. Housing Cost Report. The family housing cost reporting system is established on an accrual accounting basis. Accrual accounting is the method of accounting whereby:

(1) Costs are accounted for in the fiscal period during which the benefits are received (costs of resources consumed or applied).

(2) Costs for which benefits are applicable to future periods are deferred and considered as assets.

(3) Liabilities for unpaid costs are recorded in the accounts when goods or services are received.

(4) Income for work or services performed on a reimbursable basis is recorded in the accounts when reimbursable expenses are incurred.

b. All installation level requirements of the Family Housing Program shall be funded from the FHMA (except military labor), costed to family housing, and reported in the Housing Cost Report. This report shall measure costs on an accrual basis as defined above, in the NAVC0MPT Manual, volume 3, chapter 7. In

short, this means that costs are recognized and reported in the period when the work is performed, the materials and supplies are delivered, or the service is received. Care must be taken to ensure that costs incurred for work performed or services received for which prior year resources were obligated (e.g., major repairs) are accurately reported in the Housing Cost Report. Commitments, obligations, and disbursements are not costs, and the Housing Cost Report is not designed to collect such information. Preparation and submission procedures for the Housing Cost Report are described in detail in the NAVCOMPT Manual, volume 3, chapter 7.

c. General and Installation Commander Quarters (G&ICQ) Cost Reports. A separate cost report for individual general officer's quarters or quarters of senior officers (06) designated installation commander quarters will be prepared quarterly on a cumulative fiscal year to date basis in the same manner as the Housing Cost Report. This report will be furnished to the quarters' occupants to ensure continuing awareness of costs incurred for operation and maintenance.

d. Report on Reimbursable Orders. The Report on Reimbursable Orders (NAVCOMPT Form 2193) provides a uniform format for reporting the status of family housing funds provided on reimbursable orders. Complete preparation and submission instructions for NAVCOMPT Form 2193 are contained in the NAVCOMPT Manual, volume 3, chapter 9, part F.

e. Status of Fund Authorization. Each, as holder of an allotment of FHMA funds, must submit a Status of Fund Authorization, NAVCOMPT Form 2025 to HQMC (FD) on a monthly basis. This report describes authorizations, commitments, obligations, and disbursements of FHMA funds, by budget project. Detailed preparation and submission procedures are described in the NAVCOMPT Manual, volume 3, chapter 9, part F.

1610. EXECUTION REVIEW. The family housing financial management cycle culminates in review analysis of actual program execution. Program review is an essential element of the planning and programming which begins another financial management cycle. Review must encompass all functional areas, and should concentrate on identification of variances from plans, programs and budget, formulation of explanations for such variances, and appropriate adjustment in subsequent planning.

CHAPTER l

FAMILY HOUSING MANAGEMENT

SECTION 6: FAMILY HOUSING BUDGETING AND FINANCIAL MANAGEMENT

PART D: FAMILY HOUSING CONSTRUCTION FUNDING

1611. CONSTRUCTION. The construction subaccount includes the follOwing BP's:

1. Budget Project 10 (BP-l0) (Construction account). FH,N&MC funded constructiOn, installation, assembly, relocation, or replacement of single or multifamily dwelling units; related land acquisition, site preparation, excavation, filling and landscaping, or other land improvements.

a. The initial outfitting during construction of a dwelling unit with fixtures and other requirements which are either integral components or movable items of major equipment thereof, including major appliances; architectural and engineering supervision and inspection of construction is also included.

b. The construction of mobile home facilities and new non-dwelling buildings, directly associated with family dwelling units or a family housing area; roads, driveways, walks, and utility systems which primarily serve the family housing units; and community facilities which are integral to a family housing area and are available for use only by family housing area residents and their guests.

c. Acquisition of housing projects through purchase of the sponsor's equity and the acquisition of utility distribution systems and personal property associated with those dwelling units is also included in this BP.

2. Budget Project 33 (BP-33) (Construction account). FH,N&MC funded major improvement projects to include:

a. Conversion of existing facilities to public quarters.

b. Alterations, additions, expansions, and extensions to existing family housing facilities.

c. Construction of family housing real property other than dwelling units, required subsequent to and because of, previously acquired dwelling units.

d. Upgrade of inadequate quarters and rental housing to adequate.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 7: FAMILY HOUSING MAINTENANCE PLANNING

### PART A: MAINTENANCE, STANDARDS, AND CRITERIA

1700. INTRODUCTION. Maintenance is the recurring, periodic, or scheduled work required to preserve real property facilities and furnishings in such condition that they may be effectively used for their designated purpose. Maintenance includes work undertaken to prevent damage to facilities and furnishings which otherwise would be more costly to restore. Maintenance is normal change of occupancy type work and other work usually scheduled annually or seasonally. Preventive maintenance is the correction of incipient failures before they develop into major defects requiring costly correction, such as oiling of furnace fan bearings, replacement of filters, painting, and so forth. Deferred maintenance comprises the validated deficiencies which must be corrected to bring facilities to a state of proper condition but have not been accomplished due to lack of resources. All family housing maintenance/repair deficiencies and all required improvements will be identified on the Annual Family Housing Repair and Improvement Project Status Report, due to the CMC (LFF) by 31 October. Use the format outlined in figure 1-4 to submit the report. Report Control Symbol MC-11101-28 has been assigned to this report. The CMC will use this report for Long-range planning. This planning process is intended to provide support of budgetary requirements to reduce backlogs of essential maintenance to acceptable levels and to provide a systematic approach to improving family housing.

1701. MAINTENANCE. STANDARDS. AND CRITERIA FOR MILITARY FAMILY HOUSING

1. Family housing shall be maintained to provide adequate and habitable accommodations, protect the facilities from deterioration, and ensure economical maintenance costs. Such maintenance is to be at least equivalent to that provided by prudent management of civilian rental housing of similar type and value.

2. Family housing maintenance funds shall be applied primarily to recurring maintenance, major repair projects, and incidental improvements. Maintenance funds shall be expended on facilities only where there is a valid requirement and will not be used on the basis of the occupant’s grade or billet.

3. Job orders shall include only authorized work. Work shall not include painting, refinishing, repairs, alterations, and improvements to living units or support facilities on the family housing plant account which are outside the normal scope of the maintenance standard. It shall not include housekeeping and related services which tenants in civilian rental housing normally would be expected to perform for themselves. Housing managers must ensure that maintenance department personnel assigned to family housing job orders shall accomplish maintenance in the most expeditious, effective, and economical manner.

4. The quality of materials and workmanship for the maintenance and repair of family housing shall be consistent with the planned utilization of the housing. Materials and equipment more durable than those provided by the original construction may be used in order to reduce future maintenance and operating costs if the increased cost can be justified.

5. Exterior painting of masonry, wood, and ferrous metal shall be, accomplished only when necessary to protect surfaces and maintain water tightness.

6. Interior painting shall be accomplished only when necessary to maintain sanitary conditions, protect finished surfaces, and correct unsightly appearance. Painting solely or primarily for the purpose of redecoration is not authorized unless accomplished at occupant expense and with the approval of the activity housing director. Wallpaper, or paint others than off-white, may be purchased and applied by the occupants if approved in advance by the housing director. Occupants should be cautioned, however, that they may be required to return the walls to the original off-white color prior to termination of quarters.

7. Normally, refinishing and major repairs shall be performed at change of occupancy. Wood floors shall be sanded only when general deterioration has occurred and normally should not exceed more than once every 10 years.

8. Service calls will be performed in the most feasible, economic manner. Valid emergency work should be done immediately.

9. Grounds and landscaping shall be laid out and planned for minimal maintenance as well as erosion control, screening, and attractiveness.

10. Lawn areas beyond the yards for which occupants are responsible (normally not more than 50 feet from dwellings) should be designated for gang mowing. Clipped hedges, flowerbeds, and other highly manicured planting should be eliminated and replaced by other attractive but less demanding plant materials. Residents of family housing should be expected to take the same reasonable care of their yards as would be expected of residents of similar units in the civilian community. Residents of multiplex-type units; i.e. apartment or townhouse style where there is no specific area designated for exclusive use of individual residents, or where all the yard area is common ground, should not be required to maintain the grounds.

11. When an economic analysis indicates an advantage to the Government, without impairment to the quality of maintenance, or when maintenance or special projects are beyond the capabilities of Government maintenance personnel, services should be provided by contract.

12. Occupants of family housing shall be responsible for the same routine housekeeping and related servicing of living units, their immediate grounds, and Government-owned equipment, furniture, and furnishings as would be expected of occupants of private housing. Upon vacating units, occupants shall be required to turn over the units and the immediate environs in a clean and orderly condition. Occupants may be prosecuted under the Uniform Code of Military

Justice for loss or damage as a result of negligence. Occupants may be charged for loss or damage as a result of abuse or negligence by the member, their dependents, or guests.

13. Work performed for the convenience of the occupant (i.e., alternative utility outlets, name signs, etc.) shall be charged to the occupant. Collections shall be processed per the instructions contained in NAVCOMPT Manual, volume 3, paragraph 043113. BP 96 will be used. Occupant name signs are not required for identification purposes, therefore, the occupant will bear all associated expenses if they desire a name sign. The FH,N&MC funds will not be used for obtaining, installing, or maintaining occupant name signs.

14. During change of occupancy, the normal downtime for maintenance should not exceed 1 working day when the dwelling unit, appliances, and environs have been left in proper condition by the previous occupant and only touchup/partial painting is required. If extensive interior painting, floor refinishing, or major repair is needed, 2 to 3 days may be required; but downtime should not exceed this period. Every effort should be made to ensure maximum occupancy of all units.

15. Perimeters of housing areas should only be fenced if required for safety reasons, such as to prevent children from reaching high speed highways, drainage canals, etc., or to prevent vandalism. Perimeter fencing will not be installed merely to define Government property or to separate commercial housing from military housing. Perimeter fencing should be aesthetically accommodating to the surrounding area and should not be obtrusive or excessive. The fence should be kept to the minimal height and type which would accomplish its intended purpose.

16. All family housing real property assets including dwelling units, garages, carports, grounds, and other facilities identified on the Family Housing Property Account are to be maintained to a standard that prevents deterioration beyond that which results from normal wear and tear and which corrects deficiencies in a timely manner to ensure the full life expectancy of the facilities. The level of maintenance shall ensure that all family housing facilities are free of missing components or defects which would affect the safety, appearance, or habitability of the facilities or would prevent any electrical, mechanical, plumbing, or structural system from functioning in accordance with the design. Replacements shall match existing components in dimensions, materials, quality, finish, color, and design. During the performance and on completion of the work, debris shall not be allowed to spread unnecessarily into adjacent areas or accumulate in the work area itself. All such debris, excess material, and parts shall be cleaned up and removed at the completion of the job or at the end of each day work is in progress. Upon completion of work, any fingerprints, stains, or other unsightly marks shall be removed.

17. The following standards of maintenance should be maintained.

a. Structural Exterior. The following are standards of maintenance for the exterior of family housing facilities:

(1) Exterior Walls. An exterior wall is any wall that is exposed to the weather. All exterior walls shall be maintained in a structurally sound, weathertight condition, and in a good state of repair. The walls shall be free of noticeable pitting and corrosion, algae or fungus, deteriorated siding and trim, discoloration and graffiti, or other unsightly defects.

(2) Roofing. All roofing, flashing, and gravel stops shall be maintained in a manner which preserves a weathertight seal and prevents corrosion and abnormal deterioration of individual components. Missing pieces shall be replaced to retain the original whole condition of the roof system.

(3) Gutters. Downspouts, and Splash Blocks. Drains shall be maintained to function as originally designed to effectively channel run-off water away from the housing unit. Gutters and downspouts shall be properly aligned and secured to the house with splash blocks correctly positioned to receive the impact of the drainage water. Gutters and downspouts shall be kept free of debris or any obstruction.

(4) Overhangs. Overhangs will be maintained in an aesthetically pleasing state of repair with fascias and soffits properly secured. Bird screens and vents shall be maintained intact and free of corrosion.

(5) Windows, Doors, Screens, and Shutters. Windows, doors, screens, and shutters will be maintained to operate smoothly and properly without binding, sticking, or other defects which would prevent their functioning per the design. Exterior doors, windows, and shutters shall be maintained in a manner which preserves the weathertight seal with caulking, glazing, and weatherstripping fully intact.

(6) Miscellaneous Roof Structures. Chimneys, vent stacks, roof ventilators, or other items which pierce the roof shall be maintained to function as originally designed. Flashing shall be maintained to prevent leaking. All metal surfaces shall be maintained free of noticeable pitting and corrosion.

b. Structural Interior. The following are standards of maintenance for the interior of family housing facilities:

(1) Interior Walls. Interior walls shall be maintained free of damage, deterioration, cracks, or defective materials. The aesthetic appearance shall be free of noticeable discoloration or other defects which would render an unsightly appearance to the interior walls.

(2) Concrete Floors. Concrete floors shall be maintained in such a way so as to present a pleasing appearance and shall be in a usable and safe condition, free of cracked, spalled, or broken areas, or cracks which adversely affect the structural integrity of the floor.

(3) Subflooring. Subflooring and structural members shall be maintained in a safe and usable manner. Deteriorated subflooring members shall be repaired or replaced to retain the original whole condition of the floor.

(4) Hardwood Flooring. All hardwood floors shall be maintained in an acceptable state of repair and with a smooth, glossy finish, free of damage, deterioration, or buckling.

(5) Floor Coverings. All tile floor coverings shall be maintained free of cracks, chips, and torn or excessively worn material to provide floor coverings which are usable and pleasing in appearance. Carpeting will be maintained per the manufacturer's instructions.

(6) Ceramic Tile. All ceramic tile floors shall be maintained free of loose, damaged, broken, missing, or cracked tiles and with joints properly sealed to provide the intended watertight surface.

(7) Stairways. Stairway treads, risers, nosings, balustrades, handrails, and other structural members shall be maintained in a state of repair which provides a safe and usable system and presents an aesthetically pleasing appearance.

(8) Ceilings. All ceilings and framing members shall be properly secured. The ceiling shall be free of holes or cracks. Badly soiled, defaced or water damaged surfaces, or other defects which would render an unsightly appearance to the ceiling are to be repaired to restore surfaces to a good condition.

(9) Venetian Blinds, Miniblinds, and Shades. All blinds and shades shall be maintained to operate smoothly and properly, and kept free of damaged slats, deteriorated tapes, cords, hardware, or rails.

(10) Interior Trim. All interior trim shall be free of unsightly appearances. Surfaces shall be maintained smooth, free of chipped or peeling paint, exposed nails, warps, cracks, rot, or termite damage.

(11) Built-In Cabinetry. Cabinets, shelving, countertops, and similar items shall be maintained in a fully usable condition and with a pleasing appearance. Missing or inoperative hardware shall be replaced. The countertops shall be free of warped, marred, burned, or damaged areas.

(12) House Accessories. Accessories such as mail slots, doorstops, mechanical door bells, door knockers, paper holders, soap trays, tumbler holders, towel bars, shower curtain rods, toilet seats, medicine cabinets, venetian blind brackets, curtain rod boards, closet pulley guides, house numbers, dryer vents, smoke detectors, and so forth, shall be maintained free of defects and in a satisfactorily functioning condition.

c. Electrical. Preventive maintenance of the electrical equipment and distribution system within each unit begins with the weatherhead. The electrical equipment, distribution panel, connections, grounds, outlets, switches, wiring, and lighting fixtures shall be maintained in a safe and usable condition. Receptacles and breakers with ground fault sensors shall be capable of properly detecting faults.

d. Plumbing. All plumbing systems and fixtures intrinsic to each housing unit and other housing real property facilities shall be maintained in a good and safe operating condition, free of leaks and drips.

e. Heating, Ventilation, and Air Conditioning (HVAC). The required standard includes inspecting and maintaining heating, air-conditioning, and ventilating systems in good operating condition. All materials and equipment furnished shall be of the same grade, quality, and size as the original construction. All filters will be cleaned or replaced at least twice each year, prior to the heating season and prior to the air-conditioning season. All filters will be of the size and type recommended by equipment manufacturers. Heating and air-conditioning systems shall provide room air temperature consistent with Government energy conservation guidelines.

f. Appliances and Equipment. The maintenance, repair, or replacement of Government-owned household equipment and appliances are authorized by and subject to the restrictions, limitations, and approvals set forth in appendix B of this Manual. Appliances and equipment shall be maintained in good operating condition and will have a pleasing appearance. Appliances and equipment which cannot be adjusted, repaired, or which have exceeded their usable life shall be replaced.

g. Grounds Maintenance. The following standards have been established for the maintenance of grounds.

(1) Improved Areas. Grass should be maintained at a height of approximately 2 to 4 inches. After cutting, grass shall have a uniform height throughout, free of grass clippings in windows, on walks, drives, concrete pads, outdoor athletic courts, baseball diamonds, or on any adjacent paved or otherwise finished surface. Joints in all paved areas including streets should be maintained free of vegetation.

(2) Semi-Improved and Unimproved Areas. Grass should be trimmed to a height of approximately 7 inches. Areas containing buildings, structures, parking lots, poles, trees, ditches, exposed utilities, fences, or other obstacles shall have adjacent areas to such obstruction trimmed to the same general height as the open are as. Cuttings shall not be allowed to build up to the extent of possible damage to the undergrowth.

(3) Hedges and Shrubs. Hedges and shrubs shall be trimmed or pruned. All clippings should be removed and disposed of.

(4) Weed and Brush Control. Measures will be undertaken to control excessive growth of unwanted weeds, brush, or fungi in improved and semi-improved areas.

(5) Grasses and Ground Cover. Provisions shall be made for routine fertilizing, seeding, liming, and top dressing as necessary to maintain improved grass areas with a thick, uniform growth and uniform green color.

(6) Irrigation. Grounds maintenance care includes the periodic watering of grass areas, shrubs, trees, and other vegetation to maintain growth during

hot, dry periods. Watering may also be required when assisting new growth or directly after fertilizing, liming, or seeding.

(7) Leaf Collection. Fallen leaves shall be removed from all grass or paved areas and shrubbery.

(8) Plant Disease and Insect Control. All infestations of diseases or insects in grassed areas, trees, or shrubbery shall be treated by means of applying approved control measures. After the infestation is brought under control, steps will be taken to return any damaged vegetation to its condition prior to the infestation.

(9) Policing of Grounds. Policing of improved and semi-improved areas shall be maintained to ensure the removal of debris such as paper, tree limbs and branches, refuse, cans, bottles, and other trash prior to each mowing and routinely during the non-growing season. Areas to be policed include grass, sidewalks, streets, parking lots, athletic fields, and all other areas within the housing complex.

(10) Drainage Systems. Drainage structures including swales, ditches, inlets, curb inlets, catch basins, manholes, junction boxes, grills, piping, culverts, and headwalls shall be maintained free of debris, obstructions, brush, and weeds to provide a system that functions as originally designed and to effectively channel runoff water away from the housing area. Exposed areas shall be maintained free of missing or damaged grills; curb inlets or manhole covers; spalled, broken, or cracked concrete surfaces; cracks or holes in asphalt surfaces; and erosion along swales and ditches.

(11) Concrete Surfaced Areas. All concrete surfaced areas such as patios, sidewalks, garbage can pads, or any other areas not receiving vehicular traffic shall be maintained in a structurally sound and safe condition and in a good state of repair, at the original alignment and elevation free of damage, spalls, and major cracks.

1702. MANAGEMENT OF GENERAL OFFICER QUARTERS. The cost of operating and maintaining general officers quarters are closely scrutinized by Congress, the Office of the Secretary of Defense, and the Marine Corps. Therefore, annual operation and maintenance financial ceilings for GOQ’s as well as the long-range maintenance plans will be in strict compliance with current regulations. Refer to chapter 3, Operation and Maintenance of General Officer Quarters.

1703. APPLICABILITY

1. Repair work will be scheduled in the recurrent maintenance program when the need for it is discovered. It should not be deliberately deferred until it has grown into a special project, the cost of which exceeds the installation commander’s approval authority as defined in section 8 of this chapter.

2. Maintenance will be projected with an acceptable degree of accuraCy, using engineering life expectancy standards and installation experience factors. The projected maintenance will form the basis for preparation of budget estimates for the maintenance and repair for family housing.

3. Family housing will be upgraded periodically through improvement projects to provide amenities common to modern private sector housing.

4. Repairs and improvements to the same quarters will be scheduled simultaneously if possible to minimize vacancy time and occupancy disruption.

1704. MAINTENANCE AND IMPROVEMENT PLANNING

1. Each installation commander must develop a plan adapted to the local situation and organizational structure. The objective of this plan is to identify maintenance deficiencies and potential improvements, formulate a schedule of accomplishment, determine methods of performance, and develop funding requirements.

2. Wherever possible, the maintenance, repair, and improvements required to bring Marine Corps family housing units up to DoD standards as contained in MIL-HDBK-1190 and MIL-HDBK-1035, should be planned under the whole house rehabilitation concept. Installation commanders will develop a systematic approach to maintaining their housing assets to include the neighborhood amenities and appurtenances as well as support facilities. The goal of the Marine Corps Whole House Rehabilitation Program for family housing is to support and facilitate the mission of the base. Achievement of this goal will be accomplished by providing housing units comparable in design and amenities with contemporary private sector housing and ensuring that this housing is in aesthetically pleasing neighborhoods.

3. Identification of Requirements. Maintenance requirements are identified by three fundamental means: management observations and projections, specific inspections, and occupant observations.

a. Management observations and projections are developed from several sources, such as visual assessment of facilities on a frequent and informal basis; analyses of age and life expectancy of facilities and furnishings; facility history records; emergency/service (E/S) records; manufacturers' recommendations; and outside influences.

b. Specific inspections include, but are not limited to, the Modernization and Repair Inspection Program (MODRIP), which is the primary source; occupancy inspections; technical inspections; engineering or management studies and programs; and other comprehensive inspections performed on a random basis.

(l) The MODRIP is a formal means of identifying maintenance and repair deficiencies and potential improvements in facilities on the Family Housing Property Account and provides a basis for formulation of repair projects, improvement projects, short- and long-range maintenance management plans, and the annual operations and maintenance budget. The costs for the conduct of the MODRIP will be prorated to the categories of housing undergoing inspection.

Complete details on the development and implementation of the MODRIP are contained in NAVFACINST 11101.94.

(2) MODRIP inspections are comprehensive examinations of all facilities on the Family Housing Property Account. Inspections of a minimum sample of 25 percent of all facilities, except other public quarters (OPQ), will be performed on a 3-year cycle. Specific facilities included in one inspection should be avoided in the next inspection. Complete mechanical, electrical, structural, and other real property inspections will be conducted. Inspections may be performed by contract or by installation and EFD personnel.

(3) Inspection reports will be reviewed at the installation to purge all maintenance items which are expected to be corrected in the current year and for which funds are held, all improvements, and all approved or budgeted but unaccomplished maintenance work. The remaining items listed on the inspector's report will be identified to the CMC (LFF-3) on the Annual Family Housing Repair and Improvement Project Status Report or the installation's annual budget submission.

c. Occupant observations are an important source of identifying maintenance requirements and can be transmitted to management in many ways; e.g., personal contacts, E/S calls, community associations, or complaints to the commander or the housing organization.

1705. FORMULATION OF THE MAINTENANCE PLAN. Effective management of family housing maintenance, repairs, and improvements requires a comprehensive short-range management plan and a sound long-range management plan.

1. Long-Range Management Plan. The long-range management plan shall be developed and maintained for each housing project per MCO P11000.7. Where applicable, use the expertise of the base maintenance organization. The MODRIP should be used to generate the maintenance, repairs, and improvements identified on the long-range management plan. This plan is a time chart showing the year in which maintenance and improvements will be accomplished and replacement of any components will be necessary. This plan is subject to the review and approval of the housing manager.

2. Summary Short-Range Management Plan

a. The summary short-range plan, by housing category, is a detailed expansion of the long-range plan covering the current and budget years. The short-range plan for the current year will be within the currently assigned budget ceiling. The plan for the budget year will be unconstrained; i.e., it will show all work required to conform to maintenance standards regardless of costs. The housing manager is responsible for the development of the summary plan in cooperation with the maintenance department and will maintain and update the plan on a continuing basis.

b. Development of the summary short-range management plan is as follows:

(1) Validate annually the engineered life expectancies of all installed equipment and appliances.

(2) Inspect all areas, and schedule correction of work in the current year or budget year plan.

(3) Transfer from the long-range plan validated requirements previously scheduled for work in the current and budget years.

(4) Project occupancy turnover and identify the scope of work normally accomplished during the vacancy.

(5) Standing job orders should list seasonal services, winterizing, off-season furnace or air-conditioner preventive maintenance, and drainage or erosion control.

(6) Project scope of interior and exterior painting requirements, expressed in square feet of painted surfaces for touchup painting, and expressed in number of units for more extensive painting.

(7) Determine the scope and frequency of maintenance to be performed on common grounds areas. Identify the total acreage of such grounds to be maintained.

(8) Identify the maintenance required for other real property on the family housing plant account, such as surfaced areas, community facilities, playgrounds, etc.

(9) Identify types of items required for issue to occupants under the self-help program, as well as projected manpower costs involved in inspection of occupant self-help projects.

(10) Identify the work required to maintain exterior utilities in a satisfactory state of repair.

c. Figure 1-5 is the recommended format for the summary short-range maintenance management plan. All work and estimated costs should be distributed by fiscal quarter to ensure optimum utilization of funds and maintenance personnel.

1706. FACILITIES SERVICE CONTRACTS. Frequently it is beneficial to the installation to have the maintenance of family housing facilities performed by contract. This generally occurs when there is an economic advantage to the Government or specific requirements are beyond the capability of Government work forces. When maintenance is performed by contract, the Government must ensure that the stipulations of the contract are satisfied prior to the authorization of payment to the contractor. Care must be exercised to distinguish the nature of these contracts in terms of construction, major repair work, and painting,

which is subject to provisions of the Davis-Bacon Act, versus services not within the scope of the Davis-Bacon Act, such as maintenance, janitorial services, or trash removal. Comprehensive facilities service contracts may include some of both types of work, but the construction or repair work must be incident to the maintenance work of the contract. The installation must also ensure that work considered to be a responsibility of the occupants is not included in the terms of a facilities service contract. Contracts which span more than a 1-year period, in many instances, can result in significant advantage to the Government through reduced costs, increased competition, and improved performance, and should be considered where it is clearly demonstrated to be to the Government's advantage. When there is a reasonable possibility of advantage to the Government, multiyear contracting will be solicited at least as an alternative. Multiyear contracts require the prior approval of the CMC.



{li P1122_3.gif:Figure 1-4.--Annual Family Housing Repair and Improvement}
Projects Status Report (RCS MC-11101-28).

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 8: FAMILY HOUSING MAINTENANCE, REPAIR AND IMPROVEMENT PROGRAMS

## PART A: GENERAL INFORMATION

### 1800. INFORMATION

1. Policy. The CMC recognizes the continuous need to provide improvements and maintain adequate family housing and necessary support facilities to sustain military morale and to protect Government investments in family housing properties.

2. Six-Year Program. To assist in the planning and programming of improvements and major repairs, a 6-year management plan will be established to provide long-range forecasts and permit a realistic determination of the order of priority for projects. Housing managers will identify all known and anticipated repair, maintenance, and improvement work for the 6-year maintenance plan.

3. Project Formulation. Family housing projects are a means of correcting deficiencies or improving facilities to ensure family housing assets and supporting facilities/grounds on the Family Housing Property Account are maintained at a high standard which provides adequate and habitable accommodations consistent with preservation of plant investments. Projects are segregated into three categories: maintenance/repair, improvement, and minor construction (incidental improvement). Once the type of project has been determined, the formulation will be per the guidelines contained in this Manual.

### 1801. WHOLE-HOUSE REVITALIZATION CONCEPT

1. Recognizing the connection between adequate housing and the warfighting capability of our Marines, installation commanders shall develop a systematic approach to the improvement, repair, and unfunded maintenance of their family housing assets. Whole-house revitalization (rehabilitation) includes the concept of concurrently improving neighborhood amenities and appurtenances as well as support facilities. The ultimate goal of this process is to better support and facilitate the mission of the base and the Marine Corps. Achievement of this goal will be accomplished by providing housing units comparable in design and amenities with contemporary private sector housing and situating this housing in aesthetically pleasing neighborhoods that have appropriate infrastructure and family support services integrated with the base Master Plan. To the greatest extent possible, installation commanders will develop their major repair and improvement projects using this concept.

2. Determining the revitalization requirements involves looking at the installation’s mission, total family load, available adequate community housing, and existing family housing assets, and comparing each to a 5-year forecast of projected changes in growth or shrinkage. This process will justify

the need for the family housing being considered for revitalization. Next, determine the objectives of the revitalization. Old unfunded maintenance, repair, and improvements required for the units should be incorporated into the project. Completion of the project should ideally extend the useful life of homes by 25 years. Examples of some of the objectives could be:

a. Increase the number of three-bedroom units and decrease the number of four-bedroom units.

b. Upgrade plumbing and electrical service to conform to current building standards and codes.

c. Alter street patterns to reduce automobile traffic in residential areas.

d. Improve neighborhood outdoor recreation areas and facilities.

e. Improve thermal protection of housing units to reduce energy consumption and increase occupant comfort.

f. Improve landscaping to enhance neighborhood appearance as well as reduce erosion damage.

g. Construct sidewalks and install street lighting.

h. All Marine Corps family housing construction, which includes whole-house rehabilitation, will include residential sprinkler systems and rangehood extinguishing systems.

3. Activities may desire to use a formal architectural and engineering study to assist in developing the objectives of the whole-house rehabilitation (rehab). Project development occurs once the objectives are determined. The activity forwards the project documentation to the CMC (LFF-3), and following project validation, LFF will program for project design and execution.

4. Rehabilitating, as test units, one of each type or style home contained in the whole-house project, prior to execution of the main project, is recommended. These "model" units will help identify unknown problems or forgotten objectives before the main project is executed.

## 1802. PROJECT SCOPE

1. The improvement program and major repair program apply to one-time funding of projects. Funds in the appropriation FH,N&MC, earmarked for construction, support the improvement program; funds in the appropriation FH,N&MC, earmarked operation and maintenance, support the major repair program and demolition. Although improvement projects normally are supported with family housing construction funds, incidental improvements in conjunction with repair work may be authorized by the CMC for accomplishment with operation and maintenance funds. Marine Corps-owned housing facilities supported by the repair and improvement programs are:

ACTIVITY UIC REPORT DATE: 30 SEP __

POINT OF CONTACT:

| PROJECT PRIORITY | PROGRAM YEAR | PROJECT NUMBER | PROJECT DESCRIPTION | NUMBER UNITS | CME | AWARD | DESIGN $ REQUIRED | YEAR REQUIRED | OBLIGATED DSGN AMT | PERCENT DESIGNED | REMARKS |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | |

Figure 1-4.--Annual Family Housing Repair and Improvement Projects Status Report (RCS MC-11101-28).

Housing Site Bluebird Heights # Units 200 Category of Housing C

| Item | Current Year | | | Budget Year | | | Budget Year + 1 | | | Budget Year + 2 | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Dwelling units | Quant | Cost $ | Method | Quant | Cost $ | Method | Quant | Cost $ | Method | Quant | Cost $ | Method |
| Service calls | 1,200 | 33,390 | Facilities Service Contract | 1,200 | 35,000 | Facilities Service Contract | 1,200 | 37,000 | Facilities Service Contract | 1,200 | 40,000 | Facilities Service Contract |
| Routine M&R | | | | | | | | | | | | |
| Change of Occupancy | 95 | 24,125 | Station Forces | 95 | 25,000 | Station Forces | 95 | 28,000 | Station Forces | 95 | 32,000 | Station Forces |
| Preventive Maintenance | 200 | 20,000 | Facilities Service Contract | 200 | 20,000 | Facilities Service Contract | 200 | 24,000 | Facilities Service Contract | 200 | 27,000 | Facilities Service Contract |
| Painting | | | | | | | | | | | | |
| Interior | 95 | 25,000 | Facilities Service Contract | 95 | 28,000 | Facilities Service Contract | 95 | 31,000 | Facilities Service Contract | 95 | 33,000 | Facilities Service Contract |
| Exterior | | | | | | | 200 | 60,000 | Contract | | | |
| Other real property | | | | | | | | | | | | |
| Grounds-8 mowings | 25 acres | 10,400 | Facilities Service Contract | 25 acres | 10,800 | Facilities Service Contract | 25 acres | 11,300 | Facilities Service Contract | 25 acres | 12,000 | Facilities Service Contract |
| Major repair | | | | | | | | | | | | |
| Replace roofs | 114 | 102,600 | Contract HR-3-81 | | | | 86 | 60,000 | Contract HR-1-83 | | | |
| Replace rec eqpt | 3 areas | 4,000 | Self-help | | | | | | | | | |
| Replace furnaces | | | | | | | | | | 100 | 42,500 | Contract Project |
| Repair sidewalk | 1,800 sq ft | 18,000 | Contract | | | | | | | | | |

Figure 1-5.--Format for the Short-Range Maintenance Plan for Family Housing.

a. All types of dwelling units.

b. Nondwelling buildings directly associated with family dwelling units and which are on the family housing plant account.

c. Roads, driveways, walks, mobile home spaces, and utility systems which service family housing units and are on the family housing plant account.

d. Community facilities which are integral to a family housing area and are used only by the area residents and their house guests, and are on the family housing plant account.

2. Whenever design is considered in-developing a project, construction criteria in MIL-HDBK-1190, Facility Planning and Design Guide, MIL-HDBK-1035, family housing, and appropriate family housing specifications shall be followed. Other considerations include the following:

a. There is a continuing requirement for the facility on which the work is to be done.

b. Extensive repairs or improvements should not be considered for dwelling units or facilities being considered for replacement unless the estimated useful life of the unit or facility is 5 years or more.

c. The design, material selected, and the total cost of each project shall be consistent with the remaining economic life of and need for the existing facility.

d. The method of accomplishing the work shall be the most feasible and economical.

e. The accomplished work shall result in a complete and usable facility.

CHAPTER 1

FAMILY HOUSING MANAGEMENT

SECTION 8: FAMILY HOUSING MAINTENANCE, REPAIR AND IMPROVEMENT PROGRAMS

PART B: PROJECT INFORMATION

## 1803. DISTINCTIONS BETWEEN REPAIR AND IMPROVEMENT

1. Repair. Repair is the restoration of a real property facility or system to such condition that it may be effectively used for its designated purpose and which does not increase the property account value. This includes the replacement of constituent parts or materials which have deteriorated by action of the elements or use and have not been corrected through maintenance.

2. Improvement. Improvement is the accomplishment of alterations, conversions, modernization, additions, expansions, or extensions which increase the property account value and are for the purpose of enhancing rather than repairing a facility or system.

3. The determination that planned work will be a repair or an improvement will be made based on the definitions in the two preceding paragraphs and the guidance provided in this section.

4. When a facility, because of its age or condition is no longer adequately performing the function for which intended, it is considered to be dysfunctional and thus requires repair. In determining the most appropriate method of making the required repair, the following criteria govern:

a. Constituent parts replaced in a repair project will be approximately equal in quality and size or capacity to the item removed.

b. Maintenance work (other than annual maintenance) must be performed as a repair when it becomes a significant quantity or a prevalent condition throughout a given housing site. As examples, the few roofs, kitchen counter tops, or furnaces which fail during the year may be corrected through maintenance. However, the mass replacement of these items should be initiated through a repair project.

c. Repairs, however, can be effected by substituting for original materials under the following conditions:

(1) When a direct replacement is no longer available.

(2) When economic or environmental conditions dictate. Improved materials may be used if new materials have been developed and accepted since installation of the original material. A new material will be of a quality and durability permitted for a similar use by new construction criteria.

(3) In the course of repair by replacement, constituent parts of a structure, for example, electrical wiring, piping, and ventilating equipment (contained within the individual building), may be sized to meet current demands or modern engineering practices. Increases in capacity of heating systems or air conditioning units are specifically excluded from this provision.

5. The following lists include examples of work items normally defined as repair and improvement work, but they are not intended to be all inclusive or totally definitive.

a. Repairs

(1) Replacing broken decks or structural elements of a porch.

(2) Repairing or replacing damaged foundations.

(3) Reroofing a structure.

(4) Replacing deteriorated pavement or overlaying work.

(5) Replacing worn out (installed) equipment such as furnaces, water heaters, garbage disposals, and permanently installed dishwashers. However, repair or replacement of ranges and refrigerators is funded from FHMA,N&MCBP-12, Operation and Maintenance.

(6) Overlaying a floor, which can no longer be sanded and refinished, with linoleum or floor tile.

(7) Correcting deteriorated or damaged kitchens or bathroom facilities (repair by replacement).

(8) Refinishing enamel bathtub or washbasin surfaces.

(9) Repairing exterior wall surfaces and related or resulting painting.

(10) Installing siding over deteriorated exterior wall surfaces.

(11) Repairing or replacing existing utility lines.

(12) Correcting termite damage.

(13) Demolition of an unusable building which is unsafe, uneconomical to restore, and not being replaced is accomplished with repair funds.

b. Improvements

(1) Additional bedrooms or bathrooms - either by additions or alterations.

(2) Additional closets, bulk storage space, carports, or garages.

(3) Increased utility capacity.

(4) Modernize kitchen or bathrooms.

(5) Provision of space, utility connections, and vents for occupant-owned washers and dryers.

(6) Air-conditioning.

(7) Installation of garbage disposals and dishwashers.

(8) Installation of storm sewers, curbs, gutters, sidewalks, recreational area, street lights, security fencing, privacy fencing, patios, windbreaks, and additional off-street parking.

(9) Sound conditioning, additional insulation, storm doors and sash, gutters and downspouts.

(10) Residential sprinkler systems and rangehood extinguishing systems.

1804. PROJECT TERMINOLOGY. The following definitions apply in project documents.

1. Improvement. A general term which embraces the following categories of work.

a. Alteration. An adjustment of interior arrangements, or other physical characteristics of an existing facility, so that it may be more effectively adapted or used for its designated purpose. Examples of alterations are:

(1) Erecting or removing partitions or walls, and installing additional doors or windows.

(2) Increasing the capacity of the electrical wiring within a house when the existing wiring is not in need of replacement due to deterioration.

b. Addition/Expansion/Extension. A physical increase to a real property facility which adds to the overall external dimension of the facility.

c. Conversion. A major structural revision or alteration of a facility that changes the functional purpose for which the facility was originally designed or used. The renovation of barracks buildings for use as family apartments is a conversion.

d. Limited Incidental Improvement. Incidental improvements of a minor nature (i.e., installation of dryer vent, electrical outlet, etc.) may be accomplished with operation and maintenance funds when such alterations and additions, expansions, and extensions are approved by the CMC, or are within the authorization levels established by this Manual.

2. Maintenance. The recurrent, day-to-day, periodic, or scheduled work, required to preserve a real property facility in such condition that it may be effectively used for its designated purpose. Maintenance includes minor repair work undertaken to prevent damage to a facility which otherwise would be more costly to restore.

3. Major Repair. The restoration of a facility (exclusive of any improvements, alterations, or additions) to such condition that it may be effectively used for its designated purpose by overhaul, reprocessing, or replacement of constituent parts or materials which have deteriorated by action of the elements or usage and which have not been corrected through maintenance. Major repairs should preclude the need for any similar work on the facilities for at least 3 years, and requires approval of HQMC.

4. Minor Repair. The repair, rehabilitation (exclusive of any improvements, alterations, or additions), and replacement of structural components and installed equipment not identified as maintenance nor requiring more than 80 hours per dwelling unit for accomplishment or exceeding the installation commander’s authority for funding approval. (See the NAVCOMPT Manual, volume 3.)

5. Demolition. The complete removal of a unit or facility and the restoration of the site to its natural condition.

6. Project. Any submittal for improvement or major repair of family housing or related facilities undertaken to satisfy a requirement at the installation. Repair work which is similar in nature and required in more than one unit will be combined into a single project to determine the proper approval authority.

7. Project Costs. The total of funded and unfunded costs.

1805. PROJECT IDENTIFICATION/NUMBERING. Each repair and improvement project will be assigned an identification number by the originating installation. Under the new project numbering system, as outlined below, each installation has a unique set of project numbers to identify repair and improvement projects for family housing. (See figure 1-6.)

1. Installation identification is accomplished by a two-character alpha code shown in figure 1-6. These two alpha characters are the first two letters in the project number.

2. The two installation identification letters are followed by a dash and the letter "H." The letter "H" indicates a family housing project.

3. After the aforementioned two-character alpha code, a dash, the letter "H," and another dash, a three-digit numeric series of project numbers is developed.

The first number in the three-digit series denotes the last digit in the fiscal year of intended execution. (e.g., if the intended year of execution is 1993 the first number in the three digit series would be "3"). The next two digits are assigned by the installation in a sequential order.

4. The three digit numeric series is followed by a dash and the letter "M" to indicate a repair project or the letter "R" to indicate an improvement project.

5. The letter "M" or "R", indicating the project type, is followed by a dash and the number 1 if the project is within local approval authority or the number 2 if the project requires HQMC approval.

6. Accordingly, project number CP-H-2O3-M-2 denotes MCAS, Cherry Point, housing project, intended year of execution--of 1992, Project 03, Repair, requires HQMC approval; and PE-H-322-M-l denotes MCB, Camp Pendleton, housing project, intended year of execution of 1993, project 22, repair which can be accomplished under installation commander’s approval authority; and QU-H-215-R-2 denotes MCCDC, Quantico, housing project, intended year of execution of 1992, project 15, improvement, requires HQMC approval; and LE-H-025-R-1 denotes MCB, Camp Lejeune, housing project, intended year of execution 1990, project 25, improvement project, incidental improvement which can be accomplished under installation commander’s approval authority.

7. Identification numbers will not be changed during the l3.fe of the project even if the project is carried into the subsequent year. Should an installation need to change an M-2 or R-2 project number after the project has been validated by HQMC, approval must be obtained from the CMC (LFF-3).

8. The numbering system is displayed below.

Project Identification

| PE | H | 8 | 0 1 | M | 1 |
|---|---|---|---|---|---|
| Installation Identification | Housing Project | Intended FY Execution | Instal'n Project Number | M-Repair R-Improvement | 1-Local 2-HQMC |

HRA = M-1 Minor Repair (BP-21)

HRA = M-2 Major Repair (BP-22)

HRI = R-1 Incidental Improvements (B-23)

HC = R-2 Housing Construction Improvement (NAVFAC)

I. MINOR REPAIR (M-1)(Formerly HRA)

1. Minor Rpr requirements
2. Up-front funding provided
   a. Provided at beginning of year
   b. Subject to funds available
4. Projects budgeted for in BP-21
5. Review of Plans & Specs by HQMC not required
6. Projects survey by HQMC Reps not required
7. Prior Project ID not required

II. MAJOR REPAIR (M-2) (Formerly HRH

1. Mjaor Rpr requirements
2. Funds reserved by CMC
3. May require Project survey by HQMC Reps
4. May require Plans & Specs review by HQMC
5. Require Project Documentation
6. Authority to advertise must be provided by HQMC

III. INCIDENTAL IMPROVEMENTS (R-1) (Formerly HRI)

1. Incidental Improvement Projects
2. Projects budgeted for in BP-23 in Annual Budget submission
3. Up-Front funding provided
   a. Provided at beginning of year
   b. Subject to funds available
4. Review of Plans & specs by HQMC not required
5. Survey of Projects by HQMC Reps not required
7. Prior Project identification not required

IV. IMPROVEMENTS (R-2) (Formerly HC)

1. Improvements Projects normally receive Congressional approval by Line Item
2. All Improvement Projects $40,000 or more per unit must recieve Congressional approval
3. May require Project survey by HQMC Reps
4. May require Plans & Specs review
5. Funds must be reserved
6. Authority to advertise must be provided by HQMC

Figure 1-6.--Project Identification Numbering.

1806. PROJECT APPROVAL AUTHORITY. The following approval limitations apply.

| Category | Project Type | Limitations | Cost Authority | Approval by | Submitted |
|---|---|---|---|---|---|
| l. Incidental 1/ 2/ Improvement | | | | | |
| a. Cost per unit in any 12-month period | R-1 | $2,000 | Installa-tion Cmdr | Installa-tion Cmdr | |
| | R-2(I) | above | $2,001 and | CMC Cmdr | Installa-tion |
| b. Cost per project | R-1 | up to $150,000 | Installa-tion Cmdr | Installa-tion Cmdr | |
| | R-2(I) | 200,000 | $150,001- | CMC Cmdr | Installa-tion |
| 2. Improvement 1/ 3/ | | | | | |
| a. Cost per unit in any 12-month period | R-2 | up to $40,000 | CMC | Installa-tion Cmdr | |
| | | $40,001 and above | Congress | CMC | |
| b. Cost per project | R-2 | under $500,000 | CMC | Installa-tion Cmdr | |
| | | $500,000 to $1,000,000 | ASN w/Congressional notification | CMC | |
| | | $1,000,000 and above | Congress | CMC | |

| Category | Project Type | Limitations | Cost Authority | Approval by | Submitted |
|---|---|---|---|---|---|
| 3. Major/Minor Repairs | | | | | |
| a. Cost per unit in any 12-month period | M-1 | up to $12,000 4 | Instal-lation Cmdr | Instal-lation Cmdr | |
| | M-2 | $12,001 to $15,000 5/ | CMC | Instal-lation Cmdr | |
| | M-2 | over $15,000 5/ | Congres-sional Com-mittees | | CMC |
| b. Cost per project | M-1 | up to $300,000 4/ | Instal-lation Cmdr | Instal-lation Cmdr | |
| | M-2 | $300,001 to $3,000,000 5/ | CMC | Instal-lation Cmdr | |
| | M-2 | over $3,000,000 5/ | ASN | CMC | |

1/ For project approval authority, improvement includes maintenance or repair work to be accomplished concurrently with an improvement project.

2/ Incidental improvement projects exceeding $150,000 and under $200,000 may be identified separately to CMC for approval. The maximum of $200,000 is a statutory limitation and cannot be exceeded. Incidental improvement projects are funded with FH,O&M funds. Projects with the R-1 designator are projects within the installation commanders approval authority. Projects with the R-2(I) designated are incidental improvement projects (funded with FH,O&M) requiring CMC approval.

3/ Normally all improvement projects receive "line item' identification in the family housing budget. Improvement projects have a statutory limitation of $40,000 per unit. Projects exceeding this amount must be identified in the family housing budget submission. There is no other avenue to identify improvement projects that exceed $40,000 per unit (includes concurrent repairs) other than the family housing budget.

4/ Funding for minor repair projects (projects less than $300,000 and/or $12,000 per unit) is requested by the installation in their family housing budget submissions.

5/ Projects require CMC approval and are normally identified on the Annual Family Housing Repair and Improvement Project Status Report.

1807. MINOR REPAIR (M-1) PROJECTS

1. Minor repair (M-l) projects are repair projects which can be accomplished within the approval authority of the installation commander.

2. Minor repair (M-1) projects will not require HQMC plans and specifications review or project survey/validation, unless requested by the CMC.

3. Minor repair projects are minor repair requirements for which up-front funding may be provided at the beginning of the fiscal year, subject to availability of such funding. Up-front funding for the design and award of minor repair projects will be provided in BP 22.

4. BP 22 maintenance funding for minor repair projects will be budgeted for within the installations normal budget submission. However, individual project identification is not required in the subject submission. Individual minor repair projects will not be tracked by this headquarters. Budget submission requests for BP 22 funding need only identify the total dollar value requested for these projects. Installations identifying the need for BP 22 up-front funding for the award or design of minor repair projects must ensure that those funds can in fact be obligated in the FY requested.

5. As minor repair projects will not require HQMC review or individual project identification, installations must ensure that all projects accomplished under this authority do not exceed authorization levels or existing construction criteria.

6. Change orders to minor repair projects should be accomplished with local funding if funding is available and the total dollar value of the project does not exceed the maximum established minor repair project limitations. Change orders which exceed the local commander’s authority or require more funds than locally available should be addressed to the CMC.

7. Due to the limited amount of funds which can be allocated for minor repair projects, installations should limit their requests for up-front BP 22 funding for minor repair projects to an amount not to exceed $300,000, or, $200 times the total number of family housing units at their installation whichever is greater for the installation. For instance, an installation can request $300,000, however, if this installation has 2,000 family housing units, then the installation may request up to a total of $400,000 (2,000 x $200 - $400,000).

8. Installations may use locally available excess BP 21 funds for the funding and design of minor repair (M-l) projects. However, BP 21 funds should be locally moved to BP 22 and obligated in BP 22.

1808. MAJOR REPAIR (M-2) PROJECTS

1. The major repair projects are major repair requirements for which BP 22 funds must be reserved and authority to advertise provided by HQMC.

2. Major repair (M-2) projects may in some instances, such as whole house repairs, require Headquarters plans and specifications review.

3. On site project survey/validation by Headquarters Marine Corps representatives will be accomplished on major repair projects. Selection of projects to be surveyed on site will be accomplished upon Headquarters review of the installations annual repair/maintenance and improvement projects status report and supporting project documentation.

4. Projects to repair disaster (fire, storm, flood, etc.) damaged quarters which exceed the installation commander's approval authority should be submitted as soon as possible, and are not limited to submission in conjunction with the annual repair and improvement projects status report.

5. Major repair (M-2) projects with supporting documentation will normally be submitted annually to CMC (LFF), per part C, section 1821 of this Manual, for survey, approval, and possible programming. (See figure 1-7.)

## 1809. INCIDENTAL IMPROVEMENT (R-l) PROJECTS

1. Incidental improvement (R-1) projects are improvement projects which can be accomplished with FH,O&M funds and are within the approval authority of the installation commander.

2. Incidental improvement (R-1) projects will not normally require Headquarters plans and specifications review or project survey/validation.

3. Incidental improvement projects are projects for which up-front maintenance funding may be provided, as available, at the beginning of each FY. Up-front funding for the design and award of incidental improvement projects will be provided in BP 23.

4. Incidental improvement projects to inadequate quarters will have the same limitation as those for adequate quarters; however, improvements to inadequate quarters must be approved by CMC before the projects may be executed. Generally, improvements to inadequate quarters should only be made when the intention is to upgrade the units to adequate.

5. BP 23 maintenance funding for incidental improvement (R-1) projects will be budgeted for within the installations normal budget submission. However, project identification for incidental improvement projects is not required in the budget submission. Individual incidental improvement projects will not be tracked by this Headquarters. Budget submission requests for BP 23 funding need only identify the total dollar value requested. Installations identifying the need for BP 23 funding for the award or design of incidental improvement projects must ensure that those funds can in-fact be obligated in the FY requested.

6. Change orders to incidental improvement projects should be accomplished at the local level if local funding is available and the total dollar value of the project does not exceed the maximum established incidental improvement project limitations. Change orders which exceed the local commander's authority or require more funds than locally available should be addressed to the CMC.

7. Due to the limited amount of funds which can be allocated for incidental improvements, installations should limit their requests for BP 23 funding to an amount not to exceed a total of $150,000, or, $100 times the total number of family housing units at their installation, whichever is greater for the installation. For instance, an installation can request $150,000, however, if the installation has 2,000 family housing units then the installation may request up to a total of $200,000 (2,000 x $100 - $200,000).

8. Current statutes state "improvement includes...maintenance or repair work to be accomplished concurrently with an improvement project." Therefore, it should be noted that authorization levels for improvements must also include any concurrent maintenance and repair work. For example, if a housing unit was having $500 incidental improvements being done and at the same time $1,500 in repair work being done, this would be the maximum limit ($2,000 per unit) because you must consider all concurrent repair work as well as the incidental improvement amount.

1810. IMPROVEMENT (R-2) PROJECTS

1. Improvement (R-2) projects are used to accomplish alterations, conversions, modernizations, or additions-expansions-extensions which increase the property account value and are for the purpose of enhancing rather than repairing a facility or system.

2. Improvement (R-2) projects are projects which are funded from the family housing construction account and require funds to be reserved and authority to design and advertise provided by HQMC.

3. Improvement (R-2) projects may in some instances require HQMC plans and specifications review.

4. On site project survey/validation by HQMC representatives will be accomplished on R-2 projects. Selection of projects to be surveyed/validated on site will be accomplished upon HQMC review of the installation's annual repair and improvement projects status report and supporting project documentation.

5. Improvement (R-2) projects with supporting documentation will normally be submitted annually to the CMC (LF) per part C of this section, for survey, approval, and possible programming. (See figure 1-8.)

1811. AIR-CONDITIONING PROJECTS. The following information pertains to air-conditioning projects:

1. All air-conditioning projects-must conform to the criteria contained in MIL-HDBK-1035 and MIL-HDBK-1190. Each exception to policy requires the prior approval of the CMC (LFF-3).

2. Projects for air-conditioning of existing buildings are classified as follows:

a. Improvements

(1) New air-conditioning equipment.

(2) Replacement of existing air-conditioning equipment involving an increase in tonnage capacity or area to be air-conditioned.

b. Repairs. Projects proposing replacement of existing equipment with equipment of equal or lesser tonnage capacity and involving no increase in area to be air-conditioned.

3. Air-Conditioning project requests will conform to the same request procedures as used for improvement projects or repair by replacement type projects, with the following additional information required on the DD Form l391c:

a. Description of air-conditioning system (central air, electric heat-pump, window units, etc.).

b. A listing of the currently air-conditioned units, by assignment category, at the activity. For instance:

All 652 officer housing units are currently air-conditioned. 900 of 1200 SNCO units are air-conditioned. 1550 of 2000 NCO units are air-conditioned. None of the 400 junior enlisted units are air-conditioned.

c. Estimated additional annual operations and maintenance cost.

d. Future plans for air-conditioning additional quarters.

1812. URGENT PROJECTS. This encompasses urgently needed projects for which the estimated cost exceeds the installation commander's approval authority for repair projects. This criteria parallels the definition of minor construction improvements in that the need for the project is unforeseen, the project is necessary to correct conditions endangering health or safety, and it cannot be deferred until the next funding cycle. All projects meeting these criteria for urgency and those for the restoration of fire or storm damaged quarters, regardless of their project category (i.e., improvement or repair), qualify for consideration under this program on an as-required basis. The decision as to the appropriate project program will be made by HQMC.

1813. DEMOLITION PROJECTS. The DoD authorizes the demolition of any family housing unit on a case-by-case basis. Accordingly, when the demolition of a

unit is desired, a DD Form 1391 (FY __ Military Construction Project Data) will be prepared (see appendix H), fully justifying the proposed demolition. This documentation will be forwarded to the CMC with a completed form NAVFAC 11013/7 (Cost Estimating Form) which displays the estimated cost of restoration of the unit. Activities desiring to demolish a unit for which a deficit exists, will also submit an economic analysis comparing the cost of revitalizing the unit versus demolition and construction of a new unit.

## 1814. DESIGN OF FAMILY HOUSING REPAIR AND IMPROVEMENT PROJECTS

1. The housing manager will review all plans and specifications for family housing repair and improvement projects prior to project funding.

2. The housing manager will monitor the design of family housing repair and improvement projects to ensure the design is accomplished on time and per current directives.

## 1815. ECONOMIC ANALYSIS

1. Family housing repair projects in which the estimated cost of repair is more than 50 percent of the replacement value of the unit, or equal to or greater than $50,000 per unit, will require an economic analysis.

2. Historical quarters shall be maintained per the requirements of the National Historical Preservation Act of 1966, as amended. Full restoration to original condition is not required. However, economic analysis will be required for any project/projects proposing more than 50 percent of the replacement value in repair and maintenance work on a unit.

3. An economic analysis will consider all required repairs, even if all required repairs cannot or are not anticipated to be accomplished at the same time or given year.

4. Economic Analysis Format. Refer to NAVFAC P-442 for guidance.

## 1816. PROJECT SURVEY/VALIDATION/PRIORITIZATION

1. Annually, a representative from the CMC (LFF-3) visits each activity to validate projects with estimated costs which exceed the installation commander’s approval authority. Activities submit for validation any project that has not previously been validated and any that have undergone significant changes in scope or cost estimate since they were first validated. Once a project has been validated, it becomes a candidate for the next budget cycle.

2. During the validation process, a major repair or improvement project validation sheet will be completed jointly by the HQMC representative and activity housing representative. The project will be assigned a rating score upon completion of the validation sheet.

3. All projects exceeding HQMC approval authority are submitted in the congressional budget. They must survive the review process and appear in the budget before they can be executed. Projects within HQMC approval authority are prioritized internally within the CMC (LFF-3), considering the validation score, urgency, cost and ability of the activity to award "when," plus the length of time the project has been in the backlog.

1817. REPAIR AND IMPROVEMENT PROJECTS FOR GOQ’S

1. All projects for GOQ’s will be identified separately.

2. All GOQ’s will have a 5-year maintenance/repair and improvement plan.

3. Projects exceeding statutory limitations will be planned and developed far enough in advance so they may be included in the family housing budget submission to Congress.

4. Projects will not exceed the financial ceiling established by the CMC.

5. The limitations for incidental improvements and minor repair projects are also applicable to GOQ’s; however, any project accomplished under the installation commander’s authority for GOQ’s must be within the financial ceiling established by this Headquarters.

6. See chapter 3.

1818. INCREMENTATION PROHIBITION. Installations will not use incrementation of any form as a means to avoid exceeding established limitations. Additionally, projects will not be accomplished which will cause family housing square footage limitations to be exceeded.

_____ _____
Installation Date

_____ _____
Project No. Project Title

_____ _____
CWE

_____

_____
Work Description

RATING FACTORS

| | | |
|---|---|---|
| I. | Command Interest: | |
| | Mission Essential | 20 |
| | High Interest | 15 |
| | Nice to have | 10 |
| II. | Future Deterioration/Energy Conservation: | |
| | Property requires excessive maintenance | 20 |
| | Energy in-efficient | 15 |
| | Present condition requires no extra maintenance | 10 |
| III. | Occupant Health/Welfare: | |
| | Unsafe conditions/Potential for personal property damage | 20 |
| | Conditions detrimental to morale | 15 |
| | Below current community standards | 10 |
| | No occupant complaints | 5 |
| IV. | Structural condition/Facility appearance: | |
| | Potentially hazardous | 20 |
| | System failures/Unsightly | 15 |
| | Acceptable | 10 |
| V. | Necessity/Timeframe: | |
| | Required now, systems failed | 20 |
| | Continued maint. can delay requirement | 15 |
| | Expected future need | 10 |

Rating Score:_____ + _____ + _____ + _____ + _____ _____

HQMC Representative _____ _____
(Signature) (Date)

Installation Rep _____ _____
(Signature) (Date)

Figure 1-7.--HQMC Validation Sheet-Family Housing Major Repair Projects.

_____ _____
Installation Date

_____ _____
Project No. Project Title

_____ _____
CWE

_____
Work Description

Associated with a repair project? Y/N Project No. _____

RATING FACTORS

| | | |
|---|---|---|
| I. | Command Interest: | |
| | Mission Essential | 25 |
| | Quality of life issue | 15 |
| | Nice to have | 10 |
| II. | Energy Conservation: | |
| | Will save energy | 20 |
| | Quality of life outweighs energy savings | 15 |
| | No change in energy usage | 10 |
| | Will cost more | 0 |
| III. | Occupant Health/Welfare: | |
| | Environmental necessity | 30 |
| | Quality of life/morale booster | 20 |
| | Nice to have | 10 |
| IV. | Maintenance Requirements: | |
| | Will not appreciably increase maintenance costs | 15 |
| | Incidental maintenance costs | 10 |
| | Significant additional maintenance | 0 |
| V. | When was requirement identified: | |
| | Over 5 years ago | 10 |
| | One to 5 years ago | 7 |
| | New requirement | 5 |

Complies with regs/Public Law concerning space limitations Y/N

Rating Score:_____ + _____ + _____ + _____ + _____ =

HQMC Representative _____ _____
(Signature) (Date)

Installation Representative _____ _____
(Signature) (Date)

Figure l-8.--HQMC Validation Sheet-Family Housing Improvement Projects.

SECTION 8: FAMILY HOUSING MAINTENANCE, REPAIR, AND IMPROVEMENT PROGRAMS

PART C: PROJECT DEVELOPMENT AND SUBMISSION

1819. GENERAL INFORMATION. Major repair and improvement projects must be identified to the CMC (LFF-3) for review approval and funding.

1820. MINOR REPAIR (M-1) AND INCIDENTAL IMPROVEMENT (R-l) PROJECT DEVELOPMENT. The M-1 and R-1 projects will be submitted to the CMC (LFF) per this Manual and MCO P7100.8J, chapter 7. Note that project identification, DD Form 1391, and cost estimate are not required by HQMC, unless requested by the CMC (LFF).

1821. MAJOR REPAIR (M-2) PROJECT DEVELOPMENT

1. General Information. M-2 projects will be identified on the Annual Family Housing Repair and Improvement Project Status Report in the format contained in figure 1-4. This report will provide HQMC information concerning the status of repair and improvement projects as well as the identification of repair and improvement deficiencies. All projects which have been awarded, but not yet completed, will appear on this report. All change orders will be shown on the report by change order number and funded amount. All projects completed in the past fiscal year will appear on this report. All projects which have not been awarded will appear on this report. Projects will be identified and projected out from the present fiscal year and reflect the 6-year maintenance plan.

2. Report Preparation. Figure 1-4 shall be prepared to report all family housing real property repair and improvement projects unfunded per the guidance contained in appendix J.

3. Report Submission. Commanders of Marine Corps installations with family housing shall prepare this report per the preceding instructions and those provided in appendix J. An original and one copy of the form shall be submitted, not later than 31 October, to the CMC (LFF).

1822. IMPROVEMENT (R-2) PROJECT DEVELOPMENT

1. General Information. Improvement projects are identified on the Annual Family Housing Repair and Improvement Project Status Report (see figure 1-4). The report applies to the current backlog of unfunded improvements, including those programmed for accomplishment but still unfunded, and to the projected improvements of real property on the family housing plant account. All reported improvements are subject to onsite survey. This report is not a funding request and should not be construed as a substitute for data required in the installation’s budget submission.

2. Report Submission. Commanders of Marine Corps installations with family housing shall prepare and submit the Annual Family Housing Repair and Improvement Project Status Report in the format contained in figure 1-4 and the instructions contained in appendix J. An original and one copy of the form shall be submitted not later than 31 October to the CMC (LFF).

1823. PROJECT DOCUMENTATION. Each project identified on the annual project status reports requires specific supporting documentation prior to being considered for accomplishment. The following documentation will be provided to the CMC (LFF) with the annual Project Status Report if such information has not been previously provided to the CMC (during project validation for instance).

1. Two copies of DD Form 1391 and 1391c, figures 1-9 and 1-10, completed per appendix H.

2. Two copies of form NAVFAC 11013/7, figure 1-11, completed per appendix I.

3. Supporting photographs or drawings are encouraged.

| 1. COMPONENT | FY 19__ MILITARY CONSTRUCTION PROJECT DATA | 2. DATE |
|---|---|---|

| 3. INSTALLATION AND LOCATION | 4. PROJECT TITLE |
|---|---|

| 5. PROGRAM ELEMENT | 6. CATEGORY CODE | 7. PROJECT NUMBER | 8. PROJECT COST ($000) |
|---|---|---|---|

9. COST ESTIMATES

| ITEM | U/M | QUANTITY | UNIT COST | COST ($000) |
|---|---|---|---|---|
| | | | | |

10. DESCRIPTION OF PROPOSED CONSTRUCTION

DD FORM 1 DEC 78 1391

PAGE NO

Figure 1-9.--DD FORM 1391 (FY__ Military Construction Project Data).

| 1. COMPONENT | FY 19__ MILITARY CONSTRUCTION PROJECT DATA | 2. DATE |
|---|---|---|
| 3. INSTALLATION AND LOCATION | | |
| 4. PROJECT TITLE | | 5. PROJECT NUMBER |

DD FORM 1 DEC 76 1391c PAGE NO.

Figure 1-10.--DD FORM 1391c (FY___ Military Construction Project Data--Continued).

NAVFAC 11013/7 (1-78)
Supersedes NAVDOCKS 2417 and 2417A

**COST ESTIMATE**

DATE PREPARED

SHEET OF

ACTIVITY AND LOCATION

CONSTRUCTION CONTRACT NO

IDENTIFICATION NUMBER

ESTIMATED BY

CATEGORY CODE NUMBER

PROJECT TITLE

STATUS OF DESIGN
☐ PED ☐ 30% ☐ 100% ☐ FINAL ☐ Others(Specify) ____

JOB ORDER NUMBER

| ITEM DESCRIPTION | QUANTITY | | MATERIAL COST | | LABOR COST | | ENGINEERING ESTIMATE | |
|---|---|---|---|---|---|---|---|---|
| | NUMBER | UNIT | UNIT COST | TOTAL | UNIT COST | TOTAL | UNIT COST | TOTAL |
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Figure 1-11.--Cost Estimate (NAVFAC 11013/7).

## 1824. PROJECT SUBMISSION

1. Routine project submission should occur during the HQMC on-site validation. Project documentation will be provided to the HQMC representative. A site visit to the housing area where the project work is proposed shall occur, followed by the completion of the validation rating sheet. This method is most preferred as it provides HQMC with personal knowledge of the project requirement.

2. Projects identified during the year that cannot wait for the validation visit because they are of such importance or urgency that they be identified to HQMC as soon as possible, can be submitted at any time. Project documentation is still required.

3. The submission of project documentation, whether with or without a HQMC site visit, does not constitute project approval.

## 1825. CRITERIA FOR COMBINATION IMPROVEMENT AND REPAIR PROJECTS

1. The costs of repair necessitated by an improvement shall be identified to the improvement project but funded separately.

2. Repair unrelated to an improvement project, but to be accomplished under the same contract or at the same time, shall be processed as a separate project and shall be charged to the appropriate fund source; however, the relationship between the two will be indicated on the subject documents. Repair and improvement projects should only be combined if the work is to be performed concurrently on the same facilities, and work on disparate facilities should be treated individually. The approval levels for cost and work category (i.e., improvement or repair) shall apply.

# CHAPTER l

# FAMILY HOUSING MANAGEMENT

## SECTION 8: FAMILY HOUSING MAINTENANCE, REPAIR AND IMPROVEMENT PROGRAMS

## PART D: PROJECT LIFE CYCLE

1826. GENERAL INFORMATION. The life cycles of repair and improvement projects are similar in many ways. However, minor differences exist that may impact on project accomplishment. The following paragraphs depict the improvement and repair project life cycles.

1827. MINOR REPAIR (M-2) PROJECT LIFE CYCLE. These are minor repair projects that can be accomplished within the installation commanders approval authority. The following project life cycle applies.

1. April (budget year minus 1). Installations submit their budget which includes an exhibit requesting BP 22 funding for M-1 projects.

2. October (budget year minus 1) through January (budget year). HQMC provides the funds to accomplish the design and/or award of M-l projects to installations, subject to the availability of funds.

3. To be determined - When the project is complete, HQMC notified of completion date, total project cost, and number of units involved.

1828. INCIDENTAL IMPROVEMENT (R-1) PROJECT LIFE CYCLE. Incidental improvement projects are improvement projects that will normally be funded with BP 23 repair funds. However, the project may be funded with repair or improvement funds. Therefore, the project life cycle should follow that of a M-1 project but the life cycle may vary depending on the funding source.

1829. MAJOR REPAIR (M-2) PROJECT LIFE CYCLE. These are major repair projects that must be approved by the CMC (LFF-3). The following project life cycle applies.

1. January (budget year minus 3). Installations submit repair project listing in the format contained in figure 1-4 (not later than 31 October).

2. February through June (budget year minus 3). HQMC reviews, surveys, and validates, as required, installations repair projects.

3. July through August (budget year minus 3). HQMC prioritizes repair projects and establishes tentative biennial budget programs.

4. August through September (budget year minus 3). HQMC identifies tentative repair programs to installations, authorizes design and provides design funds

(as required) depending on funding availability. It should be noted that M-2 projects which have improvements associated with it must meet the 35 percent design completion criteria of improvement projects. (Thirty-five percent complete by November (budget year minus l)).

5. January through March (budget year minus 2). POM established for SYDP (6-year defense plan).

6. January (budget year minus 2). Installations submit M-2 project list in the format contained in figure 1-4 (not later than 31 October).

7. February through June (budget year minus 2). HQMC reviews, surveys, and validates installations' M-2 repair project for inclusion into the savings/straddle programs or early design for subsequent years.

8. April through May (budget year minus 2). HQMC finalizes repair program. HQMC prepares and submits the Marine Corps family housing biennial budget.

9. June through July (budget year minus 2). Marine Corps family housing budget reviewed by NAVCOMPT.

10. September through October (budget year minus 2). Marine Corps family housing budget reviewed by DoD.

11. December through February (budget year minus l). President's budget is established.

12. December (budget year minus 3) through September (second biennial budget year). Designs are completed and reviewed, as required, by HQMC.

13. March (budget year minus l) through September (budget year). Congressional subcommittees review the President's budget for first and second biennial budget year.

14. October (budget year). Marine Corps family housing budget is approved for each respective year in the biennial budget.

15. October through November (budget year). HQMC approves projects for advertisement and reserves funds for the respective year in the biennial budget.

16. December through September (budget year). Installation confirms low' bids and requests funding from HQMC for the project for the respective year in the biennial budget.

1830. IMPROVEMENT (R-2) PROJECT LIFE CYCLE. The point to remember about improvement projects is that although HQMC may approve a project for accomplishment in a year, funding may not ultimately be approved for the project. Improvement projects are normally line items in the Marine Corps Family Housing 3budget Submission and are subject to deletion by any office that

reviews the budget prior to final approval. The following project life cycle pertains to improvement program projects.

1. January (budget year minus 3). Installations submit annual improvement project listing in the format contained in figure 1-4 (not later than 31 January).

2. February through June (budget year minus 3). HQMC reviews, surveys, and validates, as required, installations' improvement projects for biennial budget years.

3. July through August (budget year minus 3). HQMC prioritizes improvement projects and establishes tentative biennial budget years programs.

4. August through September (budget year minus 3). HQMC identifies tentative improvement programs to installations, NAVFAC, and appropriate EFD's.

5. October through November (budget year minus 2). NAVFAC provides design funds to EFD's for the improvement projects selected for programs. Installations coordinate with EFD's to initiate design.

6. October through January (budget year minus 2). Design is initiated and must be at 35 percent by November (budget year minus 1) to remain in program. This is an OSD requirement and failure to meet this objective may result in the loss of the project and the corresponding funding for that project 7. January through March (budget year minus 2). POM established for SYDP (6-year defense plan).

8. January (budget year minus 2). Installations submit improvement project listing in the format contained in figure 1-4 (not later than 31 January).

9. February through June (budget year minus 2). HQMC reviews, surveys, and validates, as required, installations' improvement projects for inclusion into the biennial budget years savings program or for early design for subsequent years accomplishment.

10. April (budget year minus 2). Installations provide HQMC certification that design will be at least 35 percent complete by November FY (budget year minus 1).

11. April through May (budget year minus 2). HQMC finalizes improvement program. HQMC prepares and submits the Marine Corps housing biennial budget.

12. June through July (budget year minus 2). Marine Corps family housing budget reviewed by NAVCOMPT.

13. September through October (budget year minus 2). Marine Corps family housing budget reviewed by DoD.

14. October (budget year minus l). All projects for first year of biennial budget years must be at least 35 percent design.

15. December through February (budget year minus l). President's budget is established.

16. December (budget year minus 3) through September (second biennial budget year). Designs are completed and reviewed, as required, by HQMC.

17. March (budget year minus l) through September (budget year). Congressional subcommittees review the President's budget for first and second biennial budget years.

18. October (budget year). Marine Corps family housing budget is approved for each respective year in the biennial budget.

19. October through November (budget year). HQMC approves projects for advertisement and reserves funds for the respective year in the biennial budget.

20. December through September (budget year). Installation confirms low bids and requests funding from HQMC for project for the respective year in the biennial budget.

21. Normally improvement projects receive line item identification in the family housing budget submission. Because $40,000 per unit is a statutory limitation, all improvement projects exceeding this limitation must be identified in the family housing budget submission. It should also be noted that current statutes state improvement includes the rehabilitation of a housing unit and maintenance or repair to be accomplished concurrently with an improvement project."

PART E: PROJECT FUNDING

1831. GENERAL INFORMATION. when plans and specifications are approved, the project will be scheduled for funding. When the installation is authorized to advertise for bid, funds in the amount of the current working estimate, plus applicable supporting costs, will be reserved by Headquarters Marine Corps for provision to the installation commander upon receipt of accepted low bid.

1832. FUNDING FOR LOCAL AUTHORITY (M-1 AND R-l) PROJECTS. Up-front funding will be provided, as available, to activities requesting it for the execution of minor repair and incidental improvement projects during the annual budget submittal. If an activity does not have local funding available to pay for an M-1 or R-1 project, then the activity must request a funding guarantee and permission to execute the project from CMC prior to solicitation for work.

1833. FUNDING FOR MAJOR REPAIR (M-2) PROJECTS. An activity may advertise for bid only on approval from the CMC (LFF-3). Once the acceptable low bid is verified, funds will be requested from LFF-3 using the following format:

(1) Construction contract number
(2) Government estimate $_____
(3) Range of bids (no. of bids from low dollar to high dollar)
(4) Confirmed low bid $_____
(5) Bid expiration date
(6) Supervision, inspection and overhead (SIOH) $_____
(7) Post contract award costs (if applicable) $_____
(8) Recommendation, i.e. accept low bid and provide funds in the amount of $_____ (total dollar amount required)
(9) Activity point of contact

1834. FUNDING FOR IMPROVEMENT (R-2) PROJECTS. Funding will be requested in the same manner as with M-2 projects. CMC will then request NAVFAC forward the required funds to the appropriate supporting EFD.

1835. FUNDING FOR COMBINATION IMPROVEMENT AND REPAIR PROJECTS. Funding will be requested in the same manner as with M-2 projects. The R-2 bid information must be identified separately from the M-2 bid information, as funding comes from different sources.

1836. COMPLETED PROJECTS. Report the completion of all M-2 and R-2 projects on the Annual Family Housing Repair and Improvement Project Status Report. Show the project completion date and final funded cost in the remarks column.

# CHAPTER l

# FAMILY HOUSING MANAGEMENT

## SECTION 8: FAMILY HOUSING MAINTENANCE, REPAIR AND IMPROVEMENT PROGRAMS

## PART F: CHANGE ORDERS AND CONTINGENCY FUNDS

1837. INFORMATION. In unusual circumstances, contingency levels may be established for M-2 projects by HQMC. Contingency levels do not apply to improvement projects, incidental improvement projects, or M-1 projects. Contingency funds, if set aside for a project, are held at the HQMC and not forwarded with the funds necessary to award confirmed low bids.

1838. CONTINGENCY FUNDS

1. Definition. Contingency funds are a CMC established amount from which change orders to M-2 projects may be funded.

2. Established Levels. Contingency levels are established by HQMC. Installations may request a contingency level when submitting bid results and a request for funds. Upon CMC approval of confirmed low bid, the requested contingency level will be considered for approval. Requested levels normally equal five to ten percent of confirmed low bid. when determining an appropriate contingency level, consider such factors as scope of work, age of facility, time since last major repair, etc. These factors are necessary in order to justify the anticipated need for contingency funds.

3. Exceptions

a. M-1 Projects. Contingency levels will not be established for M-l projects since installation commander approval authority is $300,000 per project and $12,000 per unit per 12-month period.

b. Improvement Projects. Contingency levels will not be established for improvement projects since each project is approved by Congress as a line item in the family housing budget submission.

c. Incidental Improvement. Contingency levels are not established for incidental improvements since installation commander approval authority is $150,000 per project and $2,000 per unit per 12-month period.

d. Contingency funding should be the exception, not the rule. Funds are not provided in advance of a justifiable need.

## 1839. CHANGE ORDERS

1. Definition. A means of ordering variations, changes, and additions to the work under contract. A change order may be either additive or deductive and does not necessarily change either the contract price or the time of completion.

2. Policy

a. Thorough planning in the development of repair and improvement projects is essential. Determining project scope is a planning function and should be accomplished before a project is designed. Be specific in identifying requirements. Consider the installation's needs and desires as the customer. Careful review of plans and specifications is critical, and more than any other single effort, will ensure that the project will accomplish everything it is intended to do.

b. Projects with numerous change orders tend to imply that the project planning process was conducted haphazardly. While some change orders are due to unforeseen conditions, others are due to poor design, inadequate scope, or simply customer requested.

c. Change orders are unprogrammed and usually cost more than requirements identified in the original contract. Therefore, concerted efforts must be made to keep change orders to a minimum.

3. Chance Orders to Projects

a. M-2. Installation commanders may approve change orders to M-2 projects as long as the installation has sufficient local funds available to accommodate the change orders. If funds are unavailable, additional funding must be requested from the CMC (LFF) and the change order must be approved by the CMC (LFF). Funding of change orders must not exceed project funding authorities.

b. M-1 Projects. Installation commanders may approve and fund all change orders to M-1 projects so long as sufficient funds are available to accommodate the change orders and total project cost, to include cost of all change orders, does not exceed $300,000 or $12,000 per unit per 12-month period. If sufficient funds are not available or the total project cost will exceed the installation commanders authority, a request must be sent to the CMC (LFF) for additional funding and/or approval.

c. Improvement Projects (R-2). Change orders to improvement projects must be approved by the CMC (LFF). Upon the CMC review and approval, HQMC will request the Commander, Naval Facilities Engineering Command to provide funds to accommodate the change order.

d. Incidental Improvement (R-1). Installation commanders may approve all change orders to incidental improvements if local funds are available and the total project cost plus cost of all change orders to the project do not exceed the installation commander's authority of $150,000 per project or $2,000 per unit per 12-month period.

4. Chance Order Requests. When it is determined a change order is necessary, the activity should exhaust all attempts to satisfy the change order using local funds or deductive changes before a request for funds is submitted to HQMC.

a. Requests for funds will contain the following project historical data:

(1) Original award amount, SIOH, and year of funds.

(2) A&E amount and year of funds.

(3) Original contingency (if any).

(4) Itemized list of prior funded change orders, with change order number, amount funded, and brief description.

(5) Total project cost to date, less A&E.

b. Include the following data on the new change order for which funds are being requested:

(1) Change order number and brief description.

(2) Amount requested (including SIOH) and year of funds.

(3) The circumstances necessitating the change (why required).

(4) Justification for additional HQMC funding in lieu of local funding or deductive changes.

(5) Impact if not provided.

(6) Indicate if A&E liability is being pursued.

(7) Likelihood of additional changes and estimated cost to complete project.

c. The processing of change order funding requests will be delayed if the information in paragraphs 4a and b, preceding, is not included in the request. Requests may be made by naval message or letter, but they must be in writing.

d. The Annual Family Housing Repair and Improvement Projects Status Report will reflect all change orders awarded for M-2 and R-2 projects. The report should reveal the number of change orders per project, the respective individual change order costs, a brief description, and whether in-scope or out of scope.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 9: FAMILY HOUSING PROGRAMMING, ACQUISITION AND REQUIREMENTS DETERMINATION

## PART A: PROGRAMMING

### 1900. GENERAL INFORMATION

1. An objective of the family housing program is to ensure that all service members with dependents are adequately housed. When this objective is not being met, it is incumbent upon installation commanders to determine the requirement and recommend projects to correct demonstrated deficits.

2. The family housing survey is the basis for determining family housing requirements and for developing and supporting acquisition programs.

### 1901. PROGRAMMING POLICY

1. The Marine Corps relies on the local community as the primary source of suitable housing for Marine families. Communities near Marine installations must be apprised of projected military housing needs if they are to assist in meeting these needs. This can be accomplished by holding regular discussions with local government officials, chambers of commerce, real estate boards, and home builder associations. Programming deficits determined by the family housing survey may be discussed; however, specific program recommendations will not be discussed until the annual legislative program has been approved by Congress.

2. Current legislation requires that the Department of Housing and Urban Development (HUD) be consulted on the need for a proposed family housing construction project in an approved program. The local HUD field office generally has current data on the availability of family housing, enabling the field office to agree with the need for the project without further investigation. There may be instances, however, when HUD concurrence will be withheld pending an analysis of the housing market. In such cases, the Marine Corps will give full cooperation to HUD in order to obtain an unbiased evaluation of the military housing needs.

### 1902. CONSTRUCTION PROGRAMMING

1. Programming will be considered at locations where the family housing survey demonstrates that the total number of available adequate assets, military and private, is less than the housing requirement at the installation.

2. The type and amount of housing to be programmed for each installation or housing complex will be governed by the lowest predictable strength levels to be maintained, adequacy of existing community and military housing assets, impact of new military housing on the local economy, environment, community services, and predictable changes in availability of adequate private housing.

3. The programming of Government housing requires the evaluation of the housing requirements survey and an analysis of statistical data reflecting conditions in the community. where several projects are being proposed, this analysis will assist in setting priorities and justifying the program.

4. The construction program will be developed at the HQMC level after careful review of all existing information. The following are considerations in setting priorities in programming the acquisition of Government housing.

a. Housing Requirement. The overall housing requirement as indicated in the family housing market analysis.

b. Location. Programming priority should be given to areas determined by market analyses to be least vulnerable to local market trends and possible increases in available adequate private housing.

c. Permanent Party Strength Comparisons. The more immediate requirements for Government housing should generally receive programming priority over requirements that have been based solely on projected personnel increases.

d. Housing Market Trends. A knowledge of housing market trends in the commuting area of the installation is helpful in improving the reliability of forecasting the capacity of an area to respond to Marines' housing needs. Trends to be considered in analyzing a housing market include, but are not limited to, the following:

(1) Community housing inventory and population.

(2) Vacancy factors (rental and sale housing).

(3) Community attitudes and local government plans and regulations (e.g., plans that would either provide incentives or restrict local housing development).

(4) Conversions of rental housing to condominiums.

(5) Industrial plans (expansion, relocations, and so forth).

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 9: FAMILY HOUSING PROGRAMMING, ACQUISITION AND REQUIREMENTS DETERMINATION

## PART B: ACQUISITION

### 1903. GENERAL INFORMATION

1. The Six-Year Family Housing Program required by the Office of the OSD is a planning document which is revised annually. Projects may be added, adjusted, or deleted from the program on the basis of information developed by the most current family housing survey.

2. The information gathered from the market analysis is the basis for recommending projects for inclusion in the Six-Year Defense Plan (SYDP) and, subsequently, for justifying projects to the OSD and the Congress. Additionally, data obtained may serve boards and committees concerned with matters unrelated to housing, such as per diem studies, etc.

3. Consideration will be given to the construction of Government -owned mobile home spaces for privately-owned mobile homes provided that:

a. The number of personnel (eligible and ineligible) owning mobile homes is substantial.

b. Adequate mobile home park facilities at reasonable rates and within reasonable distances from the installation concerned cannot meet the need.

c. The use must reasonably be expected to persist for a minimum of 25 years to amortize the cost of construction.

### 1904. ACQUISITION PROGRAMS

#### 1. CONSTRUCTION

a. Projects for the construction of units will normally not be considered if less than 50 units are required. However, isolated locations will be given every consideration regardless of the size of the requirement. Construction projects will normally be limited to 500 units. In addition, project submissions will reflect the requirements by pay grade categories.

b. Construction may be accomplished either by conventional or turnkey methods. Conventional construction involves the use of in-house effort or contract architect-engineer services for the planning and design of a construction project. On the basis of the approved plans and specifications, bids are solicited and a contract is awarded for the new construction. The turnkey methods provides for the solicitation of proposals from contractors

based on the requirements for housing and design criteria. Based on a review of the plans that are submitted, an award is made and the contractor then undertakes the execution of the project. Upon satisfactory completion, the units are turned over to the Marines.

2. Leasing of Existing Units. The Marine Corps may lease privately owned quarters when there is a lack of adequate family housing. Leasing is a part of the acquisition process and the general guidelines applying to the acquisition of other government quarters also apply to the acquisition of leased quarters. In addition, there are legal restrictions imposed by the Congress which provide a framework for the administration of the leasing program.

3. Lease Construction. The Marine Corps may acquire additional family housing through leasing (section 801) program, the rental guarantee (section 802) or the out-leasing (10USC2667) program. Lease construction is part of the acquisition process and must be authorized by Congress.

4. Improvement of Existing Military Quarters. Proposals for improvements to existing military quarters assume a long range commitment and will be developed per section 8 of this Manual.

5. Construction of Mobile Home Parks. Construction of mobile home parks is also part of the acquisition process and will be considered when a need for mobile home spaces has been demonstrated by a mobile home park survey.

# CHAPTER 1

# FAMILY HOUSING MANAGEMENT

## SECTION 9: FAMILY HOUSING PROGRAMMING, ACQUISITION AND REQUIREMENTS DETERMINATION

## PART C: REQUIREMENTS DETERMINATION

### 1905. GENERAL INFORMATION

1. The family housing market analysis is the basis for determining family housing requirements and for developing and supporting acquisition programs.

2. Information gathered in the market analysis is used for producing the DD Form 1523 (Military Housing Justification), which is forwarded to OSD in support of recommended family housing projects.

### 1906. FAMILY HOUSING MARKET ANALYSIS COORDINATION

1. Marine Corps installations may be required to conduct a family housing market analysis. All Marine Corps installations in the family housing 6-year construction program will be required to conduct a market analysis. Additionally, any installation may request to conduct a market analysis if that installation desires to determine their housing requirement or potential shortages.

2. Coordinated action is required by personnel preparing the bachelor housing survey and the family housing market analysis. This action is to ensure that current and projected personnel strength figures provided by HQMC are used for both surveys and must not be changed without HQMC approval.

3. Gross family housing requirements will include service members who are on PCS orders for 2O weeks or more and have bona fide dependents residing with them, and those "key and essential" civil service employees who are heads of households who must reside on the installation for reasons of military necessity.

4. Installations are responsible for participating in the conduct of the family housing market analysis, ensuring the accuracy of the local input, recommending acquisition projects, and maintaining liaison with the local community and other Government agencies to inform them of military housing needs.

### 1907. MARKET ANALYSIS

1. Market analyses are to be completed on a periodic basis. This Headquarters will normally notify the commands when a market analysis is to be accomplished.

2. Those activities that have acquisition programmed in the budget will be required to contract for a market analysis to support the acquisition effort.

3. To support the documentation which this office will assemble, a market analysis must clearly identify the following information for the current status (as of the date of the analysis) and projected conditions (as of the date of the last year in the current SYDP).

a. Total personnel strength. The total military strength as of the date of the analysis and the projected level in the last year of the SYDP. This will include all personnel assigned to the installation and those of any tenant organization regardless of Service affiliation. This will include fleet personnel, students, transients, rotationals, hospital patients and personnel absent on temporary duty. The projected figures should be based on the information in the Facilities Support Requirements documentation. Students assigned for over twenty weeks will be considered permanent party.

b. Permanent Party Personnel. Total number of military personnel, regardless of branch of service, assigned on permanent change of duty station orders, including students assigned to courses of twenty weeks or longer.

c. Gross Family Housing Requirements. This will include all families eligible for base housing.

d. Involuntarily separated. Those members who were forced to leave their families elsewhere due to the housing situation (shortage of affordable housing or high costs for housing).

e. Unacceptably housed in the community. Those families which are living in quarters which do not meet the minimum level of adequacy as proscribed elsewhere in this Manual.

f. Voluntary Separations. Those families which chose to separate for their own convenience without regard to those items which contribute to the levels of adequacy and involuntary separations.

g. Housing Assets under military control. The family housing inventory as of the date of the report and projected to include authorized but not completed, in the budget but not yet authorized and units programmed between now and the end of the SYDP.

h. Acceptably housed in the community. This should clearly indicate the number of military families occupying private housing which meets the minimum level of adequacy.

i. Acceptable vacant rental. Reflect the current level of vacancy and the number of units projected to be available and affordable to our military families by the end of the SYDP.

4. All information should be clearly identified as officer, NCO and junior enlisted.

5. The market analysis should also reflect any other relevant information which can be used to provide justification for acquisition of housing if it is warranted at your location.

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# BACHELOR HOUSING MANAGEMENT


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# CHAPTER 2

# BACHELOR HOUSING MANAGEMENT

2000. PURPOSE. This chapter provides information to manage military bachelor housing at Marine Corps activities under the command of the CMC. The provisions of this section do not apply to transient lodging facilities (TLF's). A @TLF, commonly referred to as a "Hostess House" is a nonappropriated fund activity operated by a Morale, Welfare and Recreation (MWR) Division primarily to support transient families.

2001. BACKGROUND INFORMATION. Providing adequate bachelor housing is a combined DoD and Marine Corps objective. The Marine Corps has a responsibility to provide all personnel residing in bachelor housing with a well maintained, suitable, living environment. In order to meet this obligation, the CMC (LFF), will:

1. Develop and implement policies and procedures related to bachelor housing.

2. Maintain inventory control of all Marine Corps bachelor housing assets.

2002. RESPONSIBILITIES OF THE ACTIVITY COMMANDER. The activity commander has the primary responsibility to manage all bachelor housing. A centralized bachelor housing office shall be established at each activity to carry out this responsibility. The activity commander is responsible for the following:

1. Development and implementation of rules and regulations.

2. Assignments and terminations, including issuance of all certificates of nonavailability and approval of all authorizations for payment of basic allowance for quarters (BAQ).

3. Utilization of assets and preparation of inventory, occupancy, and utilization reports.

4. Control of storage, issue, utilization, repair, and procurement of furnishings.

5. Procurement and control of the issuance of supplies and services.

6. Coordination of utilities conservation efforts and facilities management activities.

7. Bachelor housing requirements estimation and development of a bachelor housing construction program.

2003. OCCUPANT RESPONSIBILITY. Prudent housing management involves a reasonable degree of responsibility by the occupant for the care and maintenance of assigned quarters.

1. Bachelor quarters residents shall be responsible for routine housekeeping and for reporting items for repair or replacement to the appropriate bachelor quarters management personnel. All occupants shall be clearly informed of their responsibilities and potential liabilities when assigned Government quarters. (See appendix F.) The assigned occupant is liable for loss or damage to any Government quarters, equipment, or furnishings caused by abuse or negligence of the occupant and the occupant's dependents or guests. The occupant is responsible for correcting any loss or damage caused by abuse or negligence, or to reimburse the Government. Occupants will be given the opportunity to voluntarily reimburse the Government.

2. A sample "Condition of Occupancy Form" is provided at appendix K. Activity commanders have the option to use this form as a means to ensure that all bachelor housing occupants are aware of and understand the rules regarding occupant responsibilities and liabilities.

2004. TRAINING

1. General Information. Training and education in bachelor housing management techniques and practices should include a combination of on-the-job training and formal courses of instruction. Training should be used to enhance the productivity of all military, civil service, @NAFI personnel, and non-Government employees involved in bachelor housing management.

2. Local Training. The activity commander should establish a local training program for bachelor housing management personnel. It is extremely important that management personnel are aware of the necessity to maintain adequate living conditions. The activity commander is responsible for training all bachelor housing managers (including tenants) in proper techniques of management. The local training program should be tailored to the particular level of management personnel but should in general include the following:

a. An initial course to cover major aspects of bachelor housing management duties and responsibilities.

b. On-the-job training scheduled at a regular time on a recurring basis, with appropriate follow-up.

3. Formal Training Support. Activity commanders are encouraged to take advantage of the following educational opportunities for their bachelor housing management personnel. Requests for course quotas may be addressed to the CMC (LFF-3).

a. Department of the Navy. The Chief of Education and Training has established the Bachelor Housing Management (Course No. A-800-2100) as a class "C" school under the Chief of Naval Technical Training, Naval Air Technical Training Center, Memphis, Tennessee. This 3-week course for junior level

management is held at the Fleet Training Command, Norfolk, Virginia, and the Service School Command, Naval Station, San Diego, California.

b. Department of the Air Force. The Air Force offers a 2-week Billeting Management Course (Course No. 465) at the Air Force Institute of Technology, Wright-Patterson AFB, Ohio. This course is offered to candidates in the grade of GS-7/2nd Lt or above with a B.A. degree.

c. Department of the Army. The Army offers a 1-week Unaccompanied Personnel Housing Management Course at various Army installations. The course is sponsored by the U.S. Army Engineering and Housing Support Center, Humphries Engineering Center, Fort Belvoir, Virginia.

# CHAPTER 2

# BACHELOR HOUSING MANAGEMENT

## SECTION 1: MANAGEMENT AND ASSIGNMENT POLICY

2100. GENERAL MANAGEMENT POLICY. It is the policy of the DoD and the Marine Corps that housing accommodations assigned to bachelor personnel shall meet basic physiological and psychological needs, and provide the space, privacy, and furnishings required for comfortable living. To discharge this function efficiently, the Bachelor Housing Requirements Estimate (@BHRE) will be prepared annually by the-CMC (LFF) and provided to activity commanders for validation. This report is exempt from reports control. Validation instructions are provided at appendix L. The Bachelor Housing Inventory and Utilization Data worksheet will be completed annually by the activity and submitted to the CMC (LFF) by 1 November. Instructions for completing the form are included in appendix M. Marine Corps Report Control Symbol DD-11103-01 (external RCS DD-P&L(A)1470) has been assigned to this report.

2101. UTILIZATION

1. Occupancy Standards. Maximum practical occupancy of adequate bachelor quarters shall be maintained at all times. The application of this policy, however, shall avoid creating undue hardships for service members. Occupancy rates of 95 percent for adequate housing designated for permanent personnel, and 75 percent for adequate transient or temporary additional duty (TAD) housing are the CMC's utilization goals. The activity commander is responsible for efficient management of all billeting spaces, inadequate as well as adequate.

2. Military Necessity. Regardless of standards of adequacy, military necessity shall be the overriding consideration in determining occupancy requirements when, in the judgment of the responsible commander, the billeting of an individual in a Government-owned or controlled facility is required for mission accomplishment, contingency operations, training, or maintenance of a disciplined force. Mandatory assignments to bachelor housing to reduce BAQ payments or to reduce per diem allowances may not be considered military necessity. When military necessity is invoked by a commander for purposes of assigning personnel to Government housing, the nature and reasons for the military necessity shall be specified.

3. Geographical Bachelors. Geographical bachelors shall be assigned quarters only on a space-available basis. Space-available assignments may be terminated after reasonable notice when the space is needed for occupancy by personnel in higher priority categories.

4. Unit Integrity. Application of the unit integrity concept shall be accomplished in a practical manner that ensures maximum utilization of available quarters. Activity commanders shall review unit space allocations as required and make necessary adjustments between organizations. The bachelor housing office shall be authorized to direct assignment of personnel from outside

organizations into unit-managed space to obtain maximum practical utilization and to preclude unnecessary BAQ and per diem payments.

5. Temporary Construction. All temporary construction is considered inadequate.

6. BAQ. Commanding officers supported by the activity may not authorize payment of BAQ without prior written approval of the activity commander. This administrative control is essential to ensure maximum utilization of adequate housing and preclude unwarranted BAQ payments.

2102. OCCUPANCY

1. Occupancy Eligibility. The following categories of personnel, listed in order of priority, are authorized to occupy permanent personnel bachelor housing.

a. Military necessity personnel.

b. Permanent party military bachelor personnel not drawing BAQ.

c. Permanent change of station (PCS) students unaccompanied by dependents.

d. Personnel serving dependents-restricted/all-other tours of duty in Alaska and areas outside the U.S.

e. PCS military personnel who are:

(1) Divorced, unaccompanied, and receiving BAQ for dependent support.

(2) Legally separated, unaccompanied, and receiving BAQ at the with-dependent rate.

f. Geographical bachelors on a space-available basis.

2. Dependent Occupancy of Bachelor Quarters. Permanent personnel bachelor quarters will ordinarily be used to lodge only active duty members. However, with approval of the activity commanders, dependents may be permitted to reside in bachelor quarters up to 30 days on a space-available basis.

3. Male/Female Occupancy. Marine Corps policy requires that women Marines be appropriately integrated with male Marines when the unit occupies a modern "motel style" barracks. when there are not sufficient "motel style" barracks to accommodate an entire unit, commanders will develop a billeting plan that provides men and women equitable use of existing facilities. The practice of designating a block of rooms for women Marines or an entire barracks or wing of a barracks for women Marines will be avoided to the maximum extent possible. Within this policy, the following guidelines for BOQ’s and BEQ’s will be observed to ensure that Marines are provided an adequate level of privacy:

a. All occupants of a given room will be of the same sex.

b. Where each room has private bath and toilet facilities, room assignments will be made without regard to gender.

c. Where adjoining rooms are connected by a shared bathroom, all rooms with access to the shared bathroom will be assigned to Marines of the same sex.

d. Where rooms have no individual bathroom facilities, separate central bath and toilet facilities will be designated for males and females. Under these circumstances, males and females will be isolated by wing or deck so that men and women are not required to traverse the same common areas or passageways enroute to and from their bath facilities. When such a facility is not or cannot be divided to isolate males and females, it will be designated for either men only or women only depending on the needs of the command.

4. Guests and Residents Identification. Guests and residents shall have the Armed Forces Identification Card, Uniformed Services Identification and Privilege Card, or other official identification. Adequate measures shall be taken to prevent the use of bachelor quarters by unauthorized persons.

## 2103. DIVERSIONS/REDESIGNATIONS OF BACHELOR QUARTERS

1. Adequate bachelor quarters buildings or portions thereof which are listed in the Real Property Inventory with Category Codes 721 or 724 will not be redesignated (permanent, category code change) to uses other than billeting without written approval of the CMC (LFF).

2. Adequate bachelor quarters buildings or portions thereof which are listed in the Real Property Inventory with Category Codes 721 or 724 may be diverted (temporary change) to uses other than billeting by the activity commander without CMC approval for a period not to exceed one year. Diversions of adequate quarters will not be extended beyond one year without written approval of the CMC (LFF).

3. Inadequate or substandard bachelor quarters buildings or portions thereof which are listed in the Real Property Inventory with Category Codes 721 or 724 may be redesignated or diverted to uses other than billeting by the activity commander. The Real Property Inventory records shall be adjusted as appropriate to reflect the change.

4. Requests to divert or redesignate bachelor quarters, or any portion thereof, shall be submitted to the CMC (LFF) in writing and will contain the following information:

a. Justification for diversion/redesignation.

b. The use to which the space will be diverted/redesignated.

c. Bachelor quarters deficit, and the number of privates through sergeants drawing BAQ at the without-dependents rate.

d. Building and room number(s) and number of spaces in each building to be diverted/redesignated.

e. Effect of the diversion/redesignation on the installation's construction program.

f. Number of personnel to be relocated as a result of the diversion/redesignation, and to what facilities the personnel will be relocated.

g. The alternative means, if any, of providing the required space in lieu of diverting/redesignating bachelor quarters.

## 2104. BACHELOR HOUSING CRITERIA

1. Design Criteria. The design criteria for new construction of bachelor housing is contained in @NAVFAC Design Manual DM 36.1, Unaccompanied Personnel Housing.

a. When developing the activity master plan, consideration must be given to the development of locker rooms and shower areas for those personnel not residing in bachelor quarters.

b. At those activities where new construction is replacing older facilities, consideration should be given to retaining a number of these older facilities to be used for locker rooms and shower areas, and to provide billeting space for reservists and unfunded transients.

2. Minimum Health Criteria. The minimum health criteria of 72 square feet or net living area per person is prescribed in NAVMED P-ll7, Manual of the Medical Department. When situations occur that require deviation from this standard, a waiver may be granted by the activity commander after consultation with the local preventive medicine unit. Waiver of the minimum health standards should be limited to emergency situations, avoided if possible and never preplanned into a training exercise billeting plan.

## 2105. ASSIGNMENT POLICIES

1. Permanent Personnel

a. All eligible permanent personnel are to be assigned to bachelor quarters or be authorized BAQ entitlement.

b. When adequate quarters become available, the activity commander may terminate BAQ entitlement and require military personnel (private through sergeant) to live on base.

2. Assignment to Quarters. Involuntary assignment should be made starting with the junior members first.

| PERMANENT PERSONNEL AND PCS STUDENTS | | | TEMPORARY DUTY AND TRANSIENT PERSONNEL | | |
|---|---|---|---|---|---|
| Grade | Factors | Minimum Standards | Grade | Factors | Minimum Standards |
| Captains and above (0-3 and above) | not living area square feet 1/<br>accommodations | 400 square feet<br>living room, bedroom, private bath, access to kitchen or officers mess receiving approariated fund support | all officers and warrent officers. All civilian employees. E1 through E9 (only as authorized 1/ | not living area square feet 1/<br>accommodations | 250 square feet<br>private room, bath shared not more than one other |
| Lieutenants and warrant officers (W-1 through 0-2) | not living area square feet 1/<br>accommodations | 250 square feet<br>sleeping/living room, private bath | SNCO'S (E6 through E9) | not living area square feet 1/<br>accommodations | 250 square feet<br>private room, bath shared not more than one other |
| SNCO's (E6 through E9) | not living area square feet 1/<br>accommodations | 270 square feet<br>private room, private bath | Sergeants (E5) | not living area square feet 2/<br>accommodations | 135 square feet<br>no more than two to a room, bath shared not more than one other |
| Sergeants (E5) | not living area square feet 2/<br>accommodations | 135 square feet<br>bath shared not more than one other, two to a room | Corporals and below (except E1 recruits and trainee) E1 through E4 | not living area square feet 2/<br>accommodations | 90 square feet<br>not over four to a room, central bath |
| Corporals and below (except E1 recruits and trainees) E1 through E4 | not living area square feet 2/<br>accommodations | 90 square feet<br>not over four to a room, central bath | E-1 recruits and trainees | not living area square feet 2/<br>accommodations | 72 square feet<br>open bay central bath |
| Recruits or trainees | not living area square feet 3/<br>accommodations | 72 square feet<br>Open bay, central bath | | | |

1/ Not living area is measured from the inside face of the peripheral walls of the suite and includes all spaces and partitions thereby enclosed.

2/ Not living area in this instance is the clear area in the sleeping room allocated for an individual's bed, locker, and circulation, but excludes lounges, bathrooms, and general circulation.

3/ Not living area is one equal share per person of the squad room. The squad room is all space within the peripheral walls.

1/ Only E1 through E5 personnel traveling with civilian personnel as part of a team (who are not in a student or training status or attending training conferences, meeting, seminars, or similar nonoperational functions) shall be authorized these accommodations

2/ Not living area is measured from the inside face of the peripheral walls of the suits and includes all spaces and partitions thereby enclosed.

3/ Not living area in this instance is the clear area in the sleeping room allocated for an individual's bed, locker, and circulation, but excludes lounges, bathrooms, and general circulation.

4/ Not living area is one equal share per person of the squad room. The squad room is measured to the inside face of the peripheral walls.

Figure 2-1.--Minimum Standards of Adequacy for Existing Inventory.

| Military Grade Group | Senior Executive Service | Merit Pay Employee | General Schedule | Educators (20 U.S.C. 901-907) | NAF Employees | American Red Cross | Wage System |
|---|---|---|---|---|---|---|---|
| O-7 through O-10 | SES-1 through SES-6 | -- | GS-16 thru GS-18 | | | 31 | |
| O-6 | -- | GM-15 | GS-15 | | Grade 15 | 28-29 | |
| O-5 | -- | GM-13 and GM-14 | GS-13 and GS-14 | | Grades 13 and 14 | 25-27 | WS-14 thru WS-19 WL-15 and Productive Support Equivalents |
| O-4 | -- | -- | GS-12 | Teaching Principals | Grade 12 | 24 | |
| O-3 | -- | -- | GS-10 and GS-11 | Schedule C, Step 4 and above Schedules D-F AND M-O | Grades 10 and 11 | 21-23 | WS-8 thru WS-13 WL-6 thru WL-14 WG-12 thru WG-15 and Production Support Equivalents |
| O-2 W-3 and W-4 | -- | -- | GS-8 and GS-9 | Schedule C, Steps 1-3 | Grades 8 and 9 | 19-20 | |
| O-1 W-1 and W-2 | -- | -- | GS-7 | -- | Grade 7 | 18 | |
| E7 through E9 | -- | -- | GS-6 | -- | Grade 6 | 15-17 | WS-1 thru WS-7 WL-1 thru WL-5 WG-9 thru WG-11 |
| E5 and E6 | -- | -- | GS-5 | -- | Grade 5 | | |
| E4 | -- | -- | GS-4 | -- | Grade 4 | | |
| E1 through E3 | -- | -- | GS-1 thru GS-3 | -- | Grades 1 thru 3 | | WG-1 thru WG-8 |

Figure 2-2.--Military and Civilian Equivalent Grades for Bachelor Quarters.

2108. ENVIRONMENTAL FACTORS. Quarters shall be considered inadequate for assignment purposes when they are below the air-conditioning and heating standards established in MIL-HDBK-1190, Facility Planning and Design Guide. Quarters shall be considered adequate in regard to other environmental factors, unless excepted on a case-by-case basis by the CMC.

2109. STANDARDS OF ADEQUACY FOR PRIVATE (OFF-BASE) QUARTERS

1. Standards of adequacy for private quarters are the same as standards of adequacy for Government-owned quarters. The activity commander has the overall responsibility for recording the number of Marines suitably/unsuitably housed in the community. This information (which is recorded annually on the Bachelor Housing Requirements Estimate, BHRE, and submitted to the CMC) should be accurate since on-base construction is directly reduced by the number of Marines residing in off-base adequate quarters.

2. To be considered adequate, private quarters should meet the following criteria:

a. Private quarters should meet the same MSA as set forth in figure 2-1 for Government-owned quarters with respect to the net living area and accommodations.

b. The unit should be a complete dwelling unit with private entrance and bath for the sole use of the occupant(s). The unit must be well constructed and in a good state of repair with heating and air-conditioning if appropriate for the locale.

c. The unit may be furnished, or unfurnished if the responsible commander determines that the intended occupant has sufficient furniture.

d. The unit should be located within a 1-hour drive from the duty station during rush hours.

e. The unit should be located in an area that meets acceptable standards for health, safety, and sanitation.

3. Bachelor personnel may use the services of the housing referral office for assistance in locating adequate off-base quarters.

4. Commanders or their representatives are not authorized to enter occupied private off-base quarters without the permission of the occupant(s).

# CHAPTER 2

# BACHELOR HOUSING MANAGEMENT

## SECTION 2: ORGANIZATION AND FUNCTIONS OF THE BILLETING/BACHELOR HOUSING DIVISION

### 2200. ORGANIZATION

1. The extent to which centralized bachelor housing program management is performed at each shore activity influences the organizational composition, personnel requirements, and responsibilities of the Billeting/Bachelor Housing Department. Therefore, the criteria for determining the suitability of an organizational pattern are provided on a broad scale based on functions common to Billeting/Bachelor Housing Departments at major Marine Corps Installations. Figure 2-3 depicts a typical Facilities Management Organization, and figures 2-4 through 2-7 depict a typical Billeting/Bachelor Housing organization. The table of organization shall be developed to provide an adequate work force to accomplish all billeting/bachelor housing functions regardless of the fund sources.

2. The Billeting/Bachelor Housing Department organization shall be simplified to a minimum of intermediate components or layers of supervision. The installation commander may expand or condense the organizational structure, depending on the scope of responsibilities assigned to the Billeting/Bachelor Housing Department.

3. The installation commander is authorized to determine the functions, designate billet titles, and establish the internal administrative chain of command so long as the primary responsibilities, outlined in paragraph 2201, are met. If deemed locally suitable, managers of subordinate divisions, branches or sections, such as BOQ Manager, SNCO quarters manager, etc., may be combined and established under the supervision of the bachelor housing manager.

4. The offices and work centers of the Billeting/Bachelor Housing Department should be located to facilitate coordination between processing offices, thereby enabling an orderly workflow.

### 2201. FUNCTIONS

1. General Information. The responsibilities and qualifications described herein are applicable to installations having to billet 10,000 or more permanently assigned bachelor personnel and TAD personnel. At installations having to billet less than 10,000 personnel, permanent and TAD combined, prudent measures should be taken for consideration of combining various subordinate branches and sections identified under the major component divisions as depicted in figure 2-4.

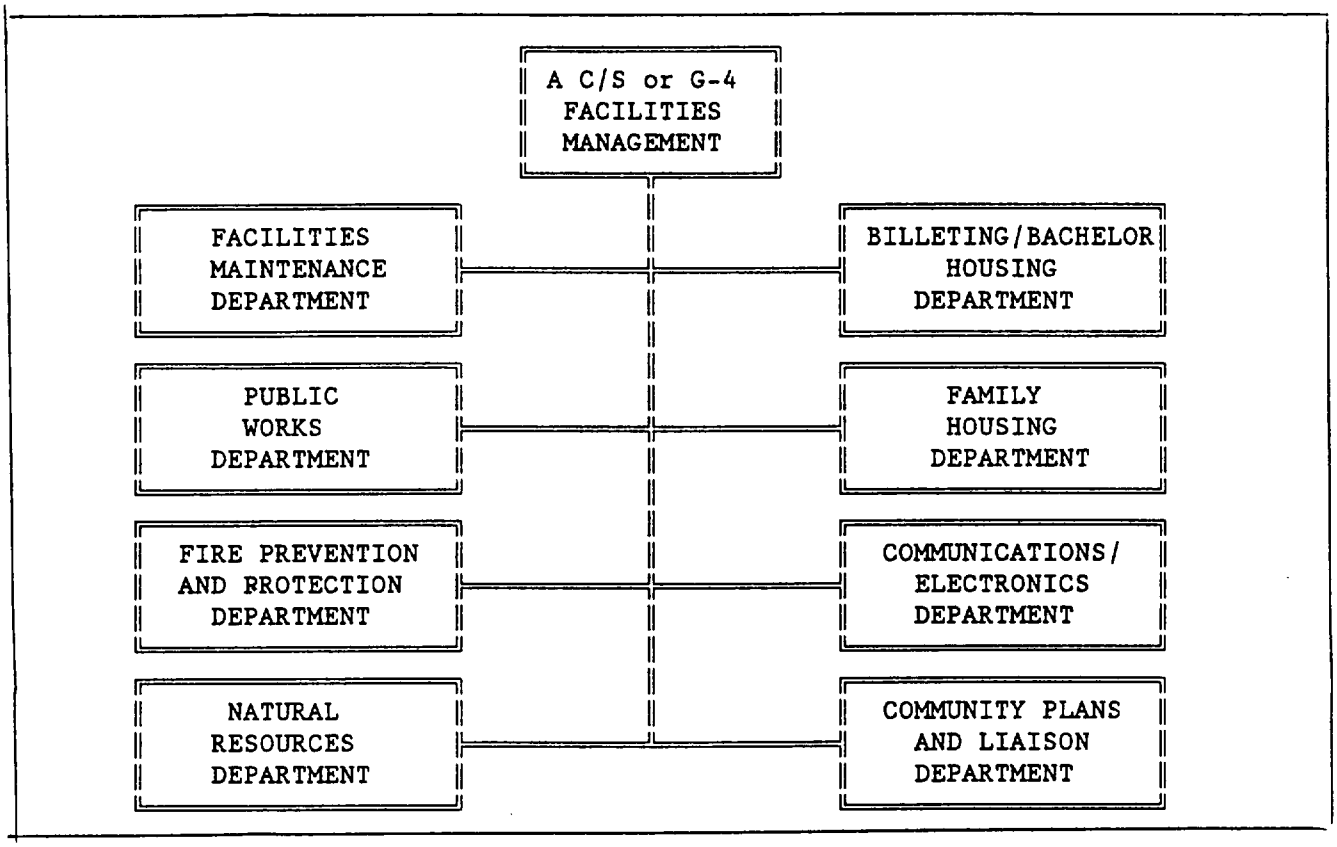


Figure 2-3.--Typical Facilities Management Organization.

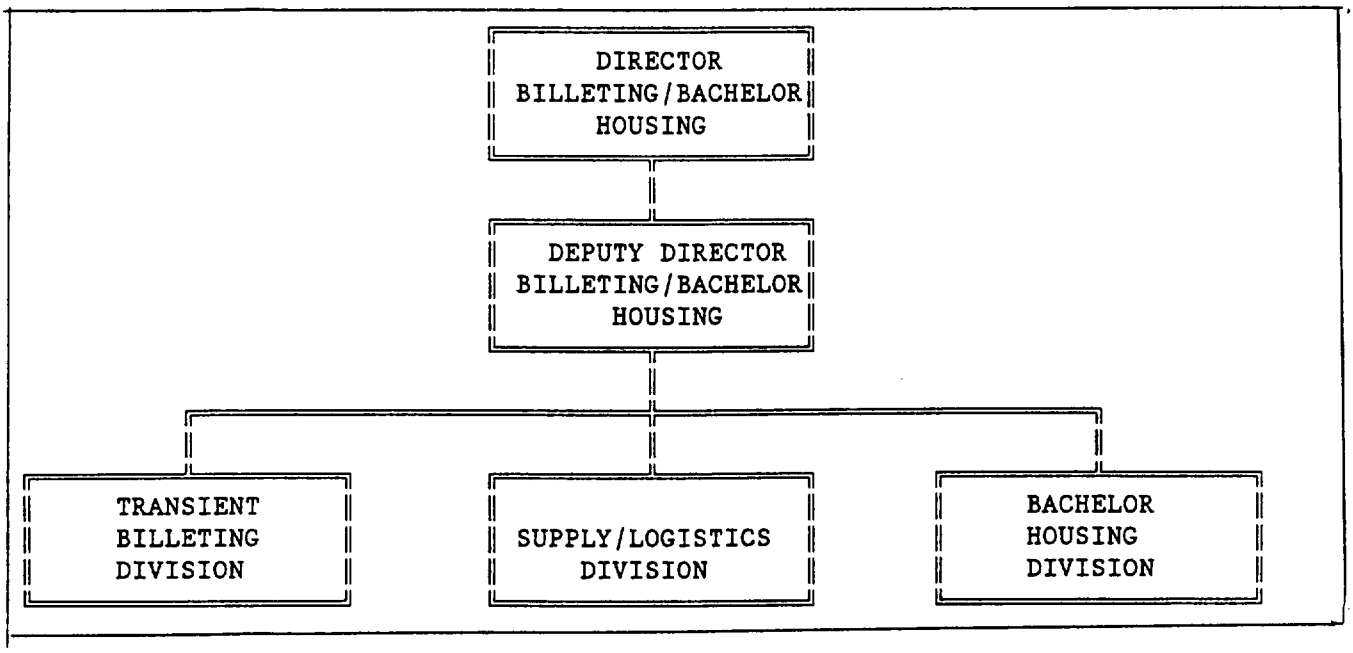


Figure 2-4.--Typical Billeting/Bachelor Housing Organization.

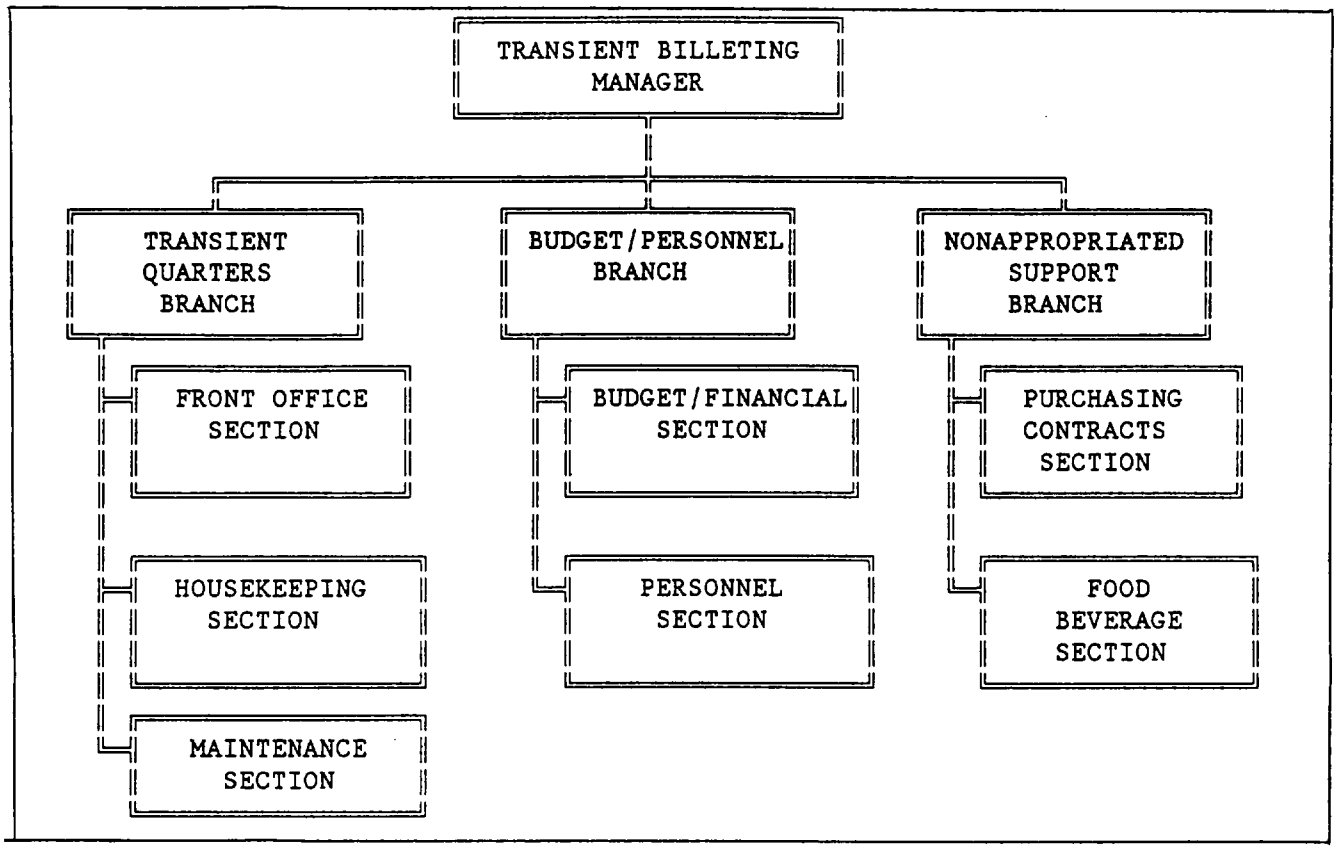


Figure 2-5.--Typical Transient Billeting Division.

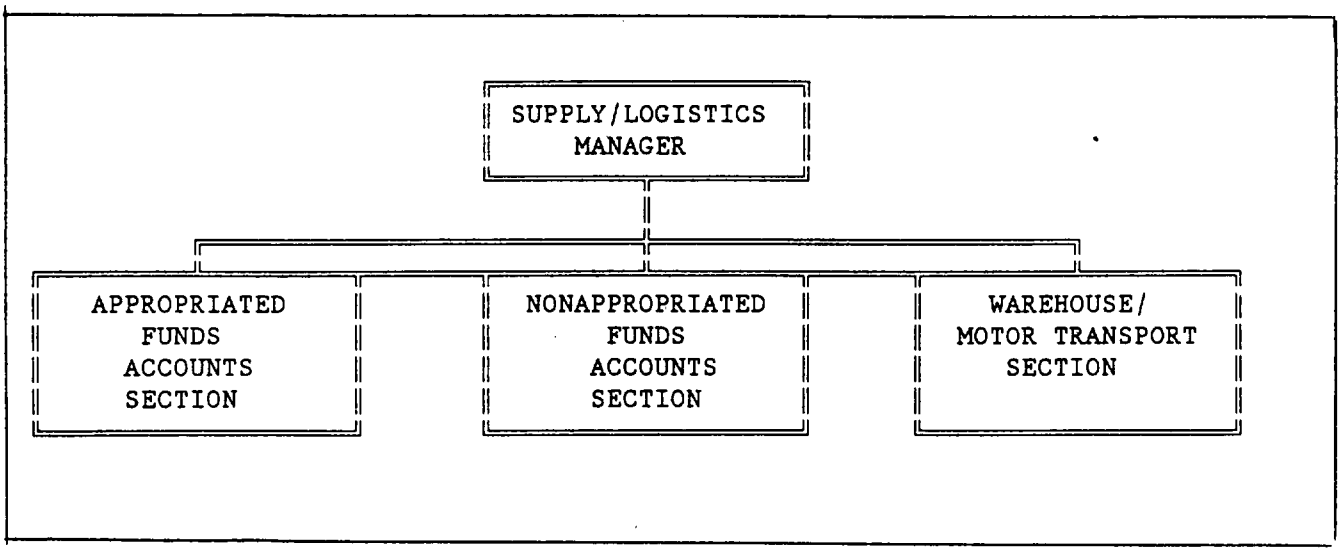


Figure 2-6.--Typical Supply/Logistics Division.

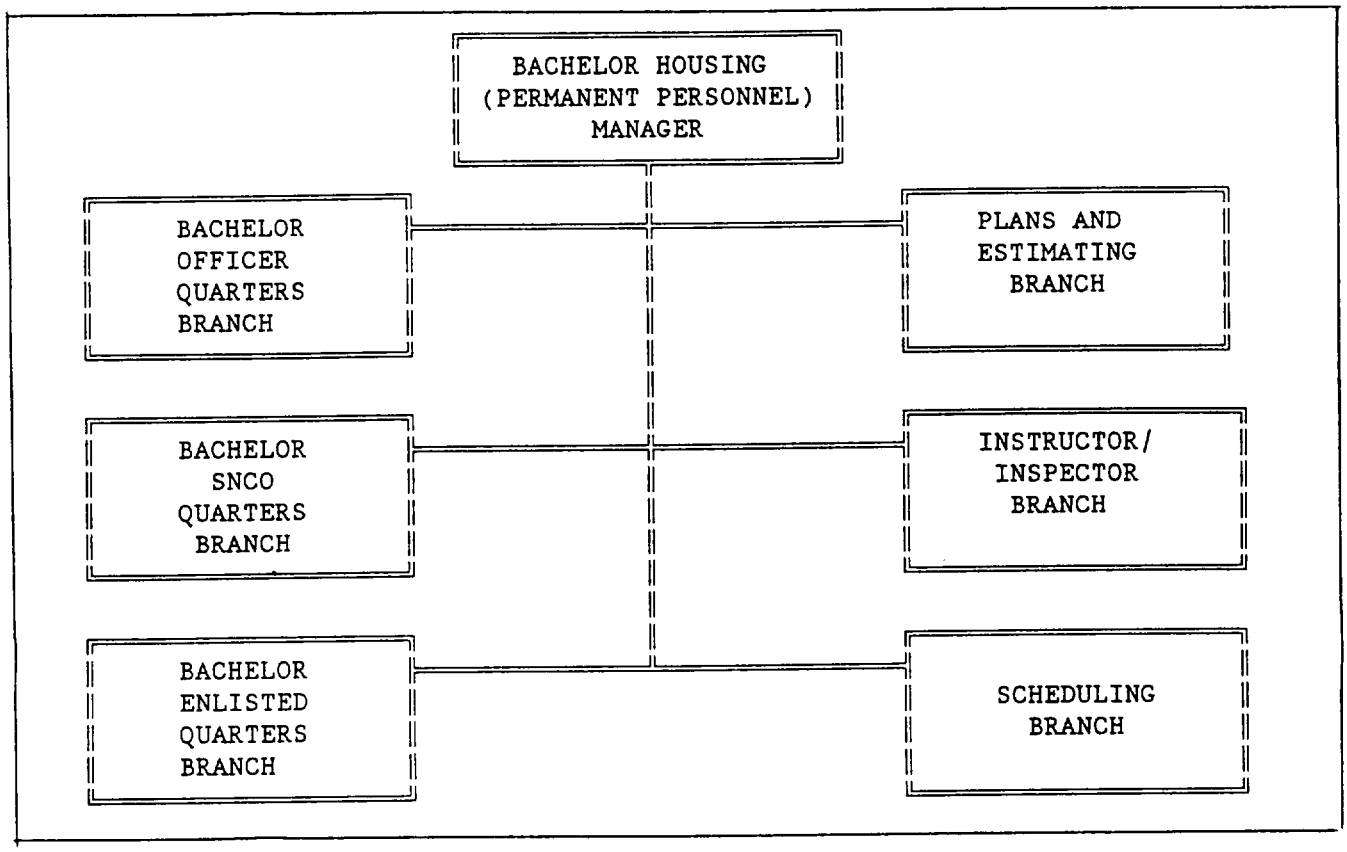


Figure 2-7.--Typical Bachelor Housing Division.

2. Director, Billeting/Bachelor Housing

a. In the chain of command, the Director, Billeting/Bachelor Housing should be responsible to the Assistant Chief of Staff, Facilities or G-4/S-4 for the centralized management of bachelor housing programs. The director, billeting/bachelor housing is responsible for the organization and overall administration of the bachelor housing assets and the NAF Billeting Fund. All or portions of bachelor housing assets may be centralized for assignments or termination of quarters or decentralized to the installation and tenant unit commanders with administrative reports, i.e., daily/monthly billeting occupancy/utilization reports submitted to the director, billeting/bachelor housing.

b. Where possible, to provide continuity, stability and professional housing management expertise, the billet should be a civil service employee (GS 1173 Housing Series) and classified at a grade comparable to the positions level of management responsibilities or equal to the family housing director. A sound housing management background with progressive housing staff management expertise is highly desirable.

c. If the director, billeting/bachelor housing is not a civil service employee, a military officer, captain or major, should be assigned on full-time basis. A strong management background is recommended to administer the bachelor housing programs, manage all bachelor housing assets and the NAF Billeting Fund.

3. Deputy Director. Billeting/Bachelor Housing

a. The deputy director performs the day-to-day responsibilities of the director, billeting/bachelor housing overseeing the total operations of the three major divisions and assumes full responsibility in the absence of the director.

b. To provide continuity and professional housing expertise, the billet should be a civil service employee (GS-1173 Housing Series) and classified at a grade comparable to the positions level of management responsibilities; or, a military officer (MOS 0402 or 1302) and have a background in either logistics or engineering.

4. Manager, Billeting Division

a. The manager, billeting division is responsible to the director, billeting/bachelor housing for the administration of all Nonappropriated Billeting Fund operations consisting of the Transient Quarters Branch, Nonappropriated Accounting/Personnel Branch and the Nonappropriated Support Branch. Management responsibilities include division matters pertaining to office management, including personnel administration; guest services; correspondence; maintaining records; coordinating budget estimates and budget preparation; billeting fund accounting work flow and reports.

b. The manager, billeting division should be designated as a nonappropriated or appropriated civilian billet (NAF UA-1173 series or Civil Service GS-1173 series) at a grade appropriate for the assigned responsibilities. The incumbent should have a well rounded background in business administration, financial management and/or housing/property management.

5. Manager, Transient Quarters Branch. The manager, transient quarters branch should be either an appropriated or nonappropriated civilian billet (NAF UA-1173 or Civil Service GS-1173 Series) at a grade appropriate for the assigned responsibilities. This billet is responsible to the manager, billeting division for all non-appropriated billeting fund transient quarters; including the distinguished guest quarters (DGQ), transient officer quarters (TOQ) and the transient enlisted quarters (TEQ) and all matters pertaining to the supervision and administration of the front desk office, reservations, housekeeping and maintenance. The functions of this billet shall include, but are not limited to:

a. Providing responsible officer for appropriated and non-appropriated property and plant account items assigned to the transient quarters branch.

b. Maintaining transient quarters operations on a 24-hour, 7-day-a-week basis to process inbound and outbound PCS/TAD/TDY personnel.

c. Performing civilian personnel administration.

d. Receiving, counting and verifying all income revenue and reviewing Daily Activity Reports from the Front Office Section.

e. Daily deposits of income revenue.

f. Providing all financial accounting documents to the Non-appropriated Billeting Fund Accounting/Personnel Branch.

g. Maintaining the Transient Quarters Change Fund, Petty Cash Fund and Reimbursement Fund.

h. Maintaining statistical productivity indexes for transient quarters operations.

i. Receiving, investigating, and resolving guest complaints.

j. Conducting routine building and grounds maintenance inspections.

k. Conducting transient quarters self-help maintenance projects.

l. Annually preparing and submitting appropriated and nonappropriated budgetary requirements to support transient quarters operation.

m. Maintaining 90-day reservations system for transient quarters, to include close coordination with the activity’s protocol office for distinguished guest quarters (DGQ) assignments.

n. Preparing and/or reviewing transient quarters related correspondence.

o. Developing and conducting pre-service and in-service training programs for transient quarters staff personnel.

p. Preparing, submitting and maintaining daily/monthly/annual occupancy and utilization rates of transient quarters.

q. When deemed appropriate, preparing the nomination package for the Marine Corps Innkeeper Award on an annual basis (see appendix N).

6. Front Desk Personnel. The transient billeting facility front desk should be manned by nonappropriated billeting fund employees, such as reservation clerk, front desk clerks and duty managers sufficient in staffing to provide 24-hour operations 7-days-a-week. Functions shall include, but are not limited to:

a. Establishing and maintaining a minimum 90-day reservations system for all transient quarters.

b. Collecting and accounting functions for service and rental charge income revenue.

c. Preparing and issuing quarters/messing endorsements for personnel with TAD orders.

d. Preparing and issuing Certificates of Nonavailability for Quarters and Messing as required.

e. Providing 24-hour, 7-days-a-week, transient quarters front desk checkin/checkout service.

f. Initially handling all guest inquiries and complaints or referring the matter to the transient quarters manager.

g. Providing duty and manager supervision of front desk clerks.

h. Performing first-echelon vehicle maintenance.

i. Performing civilian-personnel timekeeping and personnel actions.

j. Conducting pre-service and in-service training.

7. Housekeepers. The housekeeping section should consist of nonappropriated billeting fund employees or Civil Service employees reimbursed by the billeting fund. The section shall include a housekeeper supervisor (nonappropriated supervisor (NS) 3566 series), a linen stock control handler (nonappropriated non-supervisory (NA) 3566 series), housekeeper leader(s)/room inspector(s) (nonappropriated leader (NL) 3566 series) and housekeepers (nonappropriated non-supervisory (NA) 3566 series) to provide daily housekeeper services for guests. The hospitality industry standard on the ratio of housekeepers to rooms is one (l) housekeeper per twelve (l2) rooms per day and one (l) housekeeper leader/room inspector for up to twenty-four (24) rooms. Functions shall include but are not limited to:

a. Providing daily housekeeping services for guests.

b. Maintaining linen control, inventory issue, and replacement as required.

c. Maintaining statistical productivity indexes of work performed.

d. Reporting personnel support equipment damaged, missing or in need of replacement to the transient quarters manager or supply/logistics division.

e. Reporting damaged or broken property noted in the transient quarters to the transient quarters manager for corrective action.

f. Performing civilian personnel administrative actions, preparing work schedules and timekeeping.

g. Performing in-house laundering of towels and linens or utilization of the base laundry or contracted laundry services.

h. Conducting pre-service and in-service housekeeper training.

i. Providing input for annual budgetary requirements to the Transient Quarters Manager for the Accounting Section, based on usage data.

j. Submitting requisitions, as required, for administrative and housekeeping supplies to the Supply/Logistics Division.

8. Maintenance Worker. Maintenance workers may be military, civil service or nonappropriated billeting fund employees who are responsible for the maintenance of transient quarters buildings, grounds, equipment and NAF vehicles. Responsibilities shall include:

a. Preventive maintenance inspections.

b. Self-help maintenance of buildings and grounds.

c. Preparing, submitting and maintaining both emergency and routine work requests to the facilities maintenance work reception desk for problems beyond self-help capability.

d. Maintaining work request logs and records to include individual room maintenance records.

e. Conducting first-echelon maintenance on tools, equipment, and NAF vehicles.

f. Maintaining 30-day supply of consumable maintenance items such as nails, screws, light bulbs, sink stoppers, faucet washers, toilet seats, flush valves, etc.

g. Providing input for annual budgetary requisitions to the transient quarters manager, based on usage data, for the Supply/ Logistics Division. Submitting requisitions for maintenance supplies and equipment to the Supply/Logistics Division at the established reorder point of the 30-day inventory level.

h. Obtaining working parties, assignment of tasks, and supervision of same.

9. Manager, Bachelor Housing Management Division

a. The Manager, Bachelor Housing Management Division is responsible to the Director, Billeting/Bachelor Housing for the bachelor housing programs affecting the billeting of all permanently assigned bachelor personnel in the bachelor officer quarters, bachelor staff noncommissioned officer quarters, and bachelor enlisted quarters. Management responsibilities include:

(1) Direct centralized supervision and administration of the Bachelor Officer Quarters Branch and Bachelor SNCO Quarters Branch.

(2) Supervisory management of bachelor enlisted quarters under the control of tenant unit commanders for day-to-day administration.

(3) Annual review of the Facilities Support Requirements (@FSR) Planning Document for the preparation and submission of the annual Bachelor Housing Requirements Estimate (BHRE). (See appendix L.) The BHRE uses data from the FSR Joint Uniform Military Pay System (JUMPS)/Manpower Management System (MMS), and the Facilities Planning Document (@FPD) data base to determine if there is a requirement for construction of new bachelor housing facilities.

(4) Coordination with public works planners on bachelor housing construction projects; review of HQMC annual Facility Guidance Letter to include backup documents such as the DD Form 1391’s (BY 19__ Military Construction Data) for all projects proposed in the current 5-year plan.

(5) Coordination with the Public Works Department and Facilities Maintenance Department on special programs affecting bachelor housing assets including Maintenance and Repair (M&R) Programs, the activities Annual Work Plan (@AWP), Long Range Maintenance Plan (@LRMP) and the Backlog of Maintenance and Repair (@BMAR).

(6) Annual review of local directives affecting bachelor housing assets and operation, and updating as necessary.

(7) Command program management of bachelor BAQ applications and records of approval.

(8) Establishment and conduct of inspections for bachelor housing facilities and operations.

(9) Pre-service and in-service training of host and tenant unit bachelor housing managers/billeting officers.

(10) Review of contract specifications and drawings on proposed bachelor housing military construction projects, to include repair and improvement projects (M-1/R-1) and (M-2/R-2).

(11) Receives, reviews, verifies, and maintains monthly billeting utilization/occupancy reports from the host and tenant unit commanders. Provides annual budgetary input.

(12) Prepares all correspondence, messages and reports on bachelor housing matters required by higher headquarters.

b. The Manager, Bachelor Housing Management Division may be established as a military (MOS 1302) or civilian billet (GS-1173, Housing Series), and graded according to the assigned responsibilities. The incumbent should have a background or progressive experience in housing management, engineering, planning and estimating, or facilities inspection. Skills in developing SOW for contract specifications and ability to read and understand blueprint drawings are helpful.

10. Bachelor Officer Quarters Manager. BOQ's manager may be either military or civilian (GS-1173, Housing Series) responsible for the day-to-day administration of the BOQ for permanent personnel including, but is not limited to:

a. Room assignments and terminations.

b. Responsible officer for personnel support equipment, office equipment and plant account property.

c. Receiving, investigating and resolving occupant complaints.

d. Maintaining daily utilization, occupancy reports and statistical work productivity indexes.

e. Conducting routine building and grounds maintenance inspection.

f. Maintaining work request logbook/files.

g. Initiating repair/improvement projects for the BOQ.

h. Identifying and initiating self-help projects or submittal of work requests to the Facilities Maintenance Department.

i. Maintaining key control accountability.

j. Initiating requisitions for administrative and operational supplies to the Supply/Logistics Division.

k. Annual prepares of input for the budgetary requirements.

11. Bachelor Staff NCO Quarters Manager. The bachelor SNCO quarters managers may be either military or civilian (GS-1l73, Housing series) responsible for the day-to-day administration of the SNCO quarters for permanent personnel with the same functions noted above for BOQ operations.

12. BEQ's Manager. In the centralized mode of BEQ management, the BEQ manager may be either military or civilian (GS-1173, Housing series) and reports to the Manager, Bachelor Housing Management Division. In the decentralized mode, the BEQ manager should be military and report to his unit commander who has the delegated authority over day-to-day operation of assigned BEQ's. The functions are the same as noted above for the BOQ manager.

13. Manager, Planning, and Estimates Branch

a. The Manager, Planning and Estimates Branch, reports to the Manager, Bachelor Housing Management Division and is responsible for coordination with the Public Works Department Planner, Facilities Maintenance Department Planner, and the installation and tenant unit commanders on all MCON, repair and improvement projects affecting the command's bachelor housing assets. Responsibilities include the development of long-range maintenance plans; annual and quarterly work programs; inspection of real property; requesting arrangements for contractual services; screening and classifying all "in-house" work requests, including emergency and service-type work; and determining the need for engineering advice and assistance. The branch is also responsible for recommending work accomplishment by contract when a facility project exceeds the commander's approval authority or when the scope of work exceeds in-house capability.

b. The head of this branch may be established as a military or civilian billet and graded according to the assigned respon-sibilities.

14. Instructor/Inspector

a. A minimum of two instructor/inspectors should be assigned to this branch and be responsible to the Manager, Bachelor Housing Management Division for providing both pre-service and in-service instruction to all BOQ/BEQ managers for the proper administration and operational procedures of BOQ/BEQ management in order to protect the Marine Corps high dollar investment of new BOQ/BEQ facilities and ensuring a trained work force is available for unit commanders. Besides providing training, this branch is responsible for establishing, conducting and maintaining an inspection schedule of all BOQ/BEQ facilities to ensure that trained managers are complying with this directive, as well as local directives pertaining to BOQ/BEQ Management practices and to advise unit commanders of needed corrective action.

b. The billets may be either military or civilian personnel (GS-1173 housing series) with formal training and/or managerial background/experience for instruction and inspecting of bachelor housing facilities.

# CHAPTER 2

## SECTION 3: MAINTENANCE AND SELF-HELP PROGRAM

2300. GENERAL INFORMATION. Bachelor housing management will provide adequate accommodations, protect the facilities from deterioration, and employ the most economical means available to accomplish required maintenance. The activity commander is responsible for ensuring that proper maintenance planning is accomplished through the Public Works and Facilities Departments per this Manual and MCO P11000.7.

2301. CLASSIFICATION OF MAINTENANCE AND REPAIR. A clear line of demarcation cannot always be drawn between maintenance and repair. As a general rule, maintenance is work intended to prevent or correct wear and tear in order to forestall replacement; repair is work to replace constituent parts of a facility. Complete replacement of a facility constitutes construction work.

2302. MAINTENANCE EQUIPMENT

1. The following types of custodial maintenance equipment may be provided for use in and around bachelor quarters.

a. Vacuum cleaners.

b. Buffers.

c. Rug cleaners.

d. Any other equipment deemed necessary for the cleaning and upkeep of bachelor quarters.

2. The bachelor housing manager is responsible for all maintenance equipment and for maintaining a record/inventory of all such equipment.

2303. MAINTENANCE CONTROL PROCEDURES

1. The bachelor housing manager is responsible for compiling, prioritizing, and reporting trouble calls/maintenance problems on a daily basis. Trouble calls may be initiated by any person discovering a discrepancy, whether a resident, staff member, or inspecting officer. Maintenance discrepancies should be promptly reported to the bachelor housing manager or designee thereof; e.g., police sergeant.

2. Upon notification of the problem, the bachelor housing manager will determine if the bachelor housing staff can handle the problem. Emergency maintenance problems will be immediately reported by telephone to the

appropriate activity maintenance trouble desk. All discrepancies, whether routine or emergency, will be promptly recorded in a maintenance logbook.

3. A maintenance logbook will be maintained as a master file of all trouble calls as they occur. For those problems beyond the capability of the bachelor housing manager, the following action will be taken:

a. Report the problem to the activity maintenance trouble desk on the day it is discovered.

b. Obtain the job order number or work request number and record it in the maintenance logbook.

c. Coordinate with activity maintenance on the estimated time necessary to respond to and fix the problem.

d. Follow up with appropriate personnel if the problem is not fixed by the estimated completion date.

4. Maintenance logbooks will be retained for at least l year. A sample maintenance logbook format is provided in figure 2-8.

## 2304. SELF-HELP PROGRAM

1. The self-help program is limited to tasks normally undertaken by a prudent tenant and requiring minimum skills and simple handtools.

2. All self-help work shall be per locally established policy. Tasks in this category include, but are not limited to, adjusting building hardware, painting, freeing minor plumbing stoppages, and trimming grass. Locally established procedures for authorizing the drawing of materials against standing job orders shall be followed.

3. Qualified facilities maintenance department personnel shall provide technical guidance and supervision for all self-help tasks authorized by job orders. Personnel may be trained to perform self-help tasks.

4. Activity/tenant commanders are encouraged to conduct a self-help program as a means of reducing maintenance costs and enhancing the appearance of bachelor quarters. The program may be conducted to the extent that it will neither adversely affect military duty assignments nor curtail or otherwise unfavorably affect the regularly assigned civilian maintenance complement. Self-help projects may include:

a. Maintenance and repair of barracks including door hardware and screen replacement, minor plumbing repairs, glass repair, and drywall patching.

b. Grounds maintenance and improvement such as grass cutting, bush pruning, tree trimming, and shrub replacement.

c. Improvement of recreational facilities.

d. Repair of storage facilities and related structures.

e. Light bulb and globe replacement.

f. Interior sanding and painting.

| Blgd No | Rm No | Date | Description of Problem | Work Req No | Follow-up Action | Date Comp |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Figure 2-8.--Sample Maintenance Logbook Format.

# CHAPTER 2

## SECTION 4: LEASING

### 2400. BACKGROUND

1. Authority for the Secretary of the Navy to lease lodging accommodation for bachelor military personnel comes from 20 U.S.C. 7571(a).

2. The Secretary of the Navy authorizes the CMC to acquire real property by lease (Marine Corps leases only)and, therefore, to renew, extend, or otherwise administer such leases, up to $100,000 in any given case.

3. Leases/contracts are executed for the Marine Corps by the appropriate Engineering Field Division (EFD) of the Naval Facilities Engineering Command (NAVFACENGCOM).

### 2401. LEASE EXECUTION

1. Policy. Leasing of bachelor quarters is authorized, subject to the following conditions:

a. When it has been determined that bachelor quarters under the control of the Marine Corps are not available to satisfy the requirement.

b. When no suitable facilities under the control of the DoD or other Federal agencies are reasonably available for use by the Marine Corps on an individual assignment, permit, or joint-use basis.

c. When leasing offers demonstrated cost or operational benefits over alternative billeting arrangements.

2. Guidance

a. The BAQ of the occupant will be forfeited during the period that leased quarters are occupied, except in the case of divorced/ legally-separated personnel for whom accommodations have been leased and who are receiving BAQ and VHA in order to provide dependent support.

b. Ordinarily, leased bachelor housing will be provided for PCS enlisted only.

c. Leasing of lodging accommodations for personnel in a duty transient status (temporary duty and temporary additional duty (TAD)) is authorized, subject to the conditions contained in paragraph 2401.1, and when a demonstrated savings over per diem cost will be realized.

d. Bachelor personnel who change their status while occupying leased quarters become ineligible for leased quarters as of the day prior to the status change. The lease will also be canceled as of the day prior to the status change.

3. Action

a. The Commanding Generals of the 4th Marine Division and 4th Marine Corps Aircraft Wing; directors of the Marine Corps districts; Director of Central Design and Programming Activities (CDPA); and Commanding Officer, Marine Corps Finance Center, are authorized to obtain leases for lodging accommodations for active duty personnel within the policy and guidance established in paragraphs 2401.1 and 2401.2, and the general criteria and procedures provided in paragraphs 2402 and 2403 of this chapter.

b. Activity commanders are not authorized to lease bachelor quarters without approval of the CMC (LF).

2402. GENERAL LEASING CRITERIA. The following general criteria shall apply to all leased accommodations for bachelor military personnel:

1. The leased unit must be a complete dwelling with private entrance and bath for the sole use of the occupants. The unit must be well-constructed, in a good state of repair, and provided with utilities appropriate to the locale. The unit may be furnished. Unfurnished units may be leased when the responsible commander determines that the intended occupant has sufficient personal furniture to support their needs.

2. In all cases, leased quarters must meet the same MSA as prescribed for Government-owned quarters in paragraph 2106. Kitchen facilities will be included as part of the accommodations, and basic allowance for subsistence (BAS) will normally be authorized for bachelor military personnel utilizing the facilities. Multiple occupancy, two or more persons of the same sex, per leased unit, is permissible so long as the MSA is adhered to.

3. The leased accommodations are to be located within reasonable travel time from residence to duty location (60 minutes during rush hour). The area where the leased units are located should be serviced by local transportation.

4. The unit(s) to be leased should meet acceptable standards for health and sanitation.

5. Mobile homes are normally considered to be inadequate accommodations.

2403. LEASING PROCEDURES. The following general procedures shall apply to all leasing for bachelor quarters:

1. Leased units supplement Government-owned quarters with respect to their assignment to individuals.

2. The terms of the lease shall include the right of the Government to the lodging units periodically for deficiencies.

3. The lease must contain a 30-day cancellation clause in favor of the Government. The lease shall be restricted to the fiscal year within which it is executed. However, the lease should provide for optional extension or renewal.

4. The rental rate in any lease or service contract will not exceed the actual commercial rental value to the general public. The rent charged by the lessor will defray all costs of utilities except telephone. No utility or other charges, except telephone, will be paid by the lessee (the U.S. Government) or assigned occupant.

5. The individuals who are to occupy the unit(s) will not be named in the lease or service contract.

6. The lease or contract will describe the premises and will specify the number of rooms contained therein.

7. It is recommended that smoke detectors be located in leased quarters. If the smoke detectors are furnished by the Government, they should be retained by the Government when the lease is canceled.

8. Housing referral services of military installations may be used in locating potential leased accommodations.

CHAPTER 2

SECTION 5: TRANSIENT QUARTERS MANAGEMENT

2500. GOVERNMENT TRANSIENT QUARTERS. Transient quarters are operated primarily to provide a service to duty transient personnel and TAD students, and to conserve appropriated funds through reduced per diem payments.

1. Sufficient quarters shall be set aside to accommodate TAD transient personnel. Housing utilization reports should be reviewed periodically and inventory adjustments made, as necessary, to attain the optimum mix of housing for permanent party personnel and TAD transients. Certificates of nonavailability may not be issued to duty transients, either military or civilian, when adequate housing is available. When designated transient quarters are fully occupied, transients may voluntarily occupy permanent party quarters. TAD transients will be assessed no charge for use of permanent party quarters unless billeting fund services are extended to those quarters.

a. The following personnel are entitled to designated transient quarters on a confirmed reservation basis:

(1) Military personnel and DoD civilians on TAD orders.

(2) American Red Cross and Navy Relief Society officers or employees on official business.

(3) U.S. and foreign civilians traveling as guests of the Armed Forces.

(4) Reserve personnel in a TAD status, unit training status, and annual trainees on individual orders.

(5) TAD foreign nationals or foreign military trainees engaged in or sponsored by military assistance or similar training programs unless prohibited by the Status of Forces Agreement (SOFA).

(6) Family members on medical TAD orders.

(7) Military personnel, and/or their family members, arriving at or departing from overseas installations on PCS orders when TLF or permanent housing is not immediately available.

(8) Official guests of the activity commander. (Guest speakers, visiting civilian chaplains, etc.)

b. The following personnel may occupy designated transient quarters on a space-available basis.

(1) Retirees, military personnel on leave, family members or guests of military personnel assigned to the activity if TLF space is not available.

(2) DoD civilian employees and their families arriving or departing incident to PCS when TLF's are not available.

(3) Personal guests of the activity commander.

c. For personnel who are neither on TAD nor traveling as guests of the Armed Forces, the maximum period for occupying transient quarters is 30 days. The 30-day limit may be waived by the activity commander on a case-by-case basis for reasons of military necessity or personal hardship.

2. An advance reservation system will be established which will enable personnel to determine the availability of adequate Government quarters at the TAD site. The system must be capable of providing at least 30 days advance notice of non-availability of quarters to ensure that the traveler has sufficient time to make other arrangements for lodging prior to arrival. If circumstances preclude requesting reservations in advance, the traveler will report to the billeting office for assignment to available accommodations, unless the traveler's orders direct otherwise. Since travelers are required to submit a certificate of nonavailability of Government quarters for reimbursement, billeting office procedures will require recordkeeping of advance requests which could not be accommodated in order that orders may be appropriately endorsed upon arrival of the traveler. Reservations shall be accepted only when accommodations can be made available for the entire temporary duty period.

2501. USE OF FAMILY HOUSING. Housing under the cognizance of the Family Housing Management Account will not be used for transient quarters, except when temporary diversion has been authorized by the CMC (LFF).

2502. NONDUTY TRANSIENTS. Nonduty transients may be accommodated on a space-available basis only. Nonduty transients shall be advised at the time of registration that occupancy is strictly on a day-to-day, space-available basis and that they must vacate no later than the following day if the quarters are required for duty transients.

2503. FACILITIES, SERVICES, AND SUPPLIES. As a minimum, transient quarters should provide the same facilities, services, and supplies which would ordinarily be provided a permanent BOQ/BEQ resident of the same grade. Transient units should be considered adequate only when meal facilities (Government or commercial) are available within a reasonable walking distance or when transportation is provided.

1. The following services and supplies are required in all units used for transient personnel:

a. Twenty-four-hour check-in and check-out service.

b. Twenty-four-hour wake-up service, or issue of an alarm clock.

c. Custodial service in all common-use areas.

d. Daily maid service including bed making, cleaning the bathroom, emptying the trash containers and ash trays, dusting, vacuuming, and replacement of towel, washcloth, and drinking glass.

e. Change of bed linens when guests have departed or at least weekly for long term guests.

f. At least one towel, washcloth, bar of soap, and drinking glass per person.

g. Lock and key for doors to all separate units and, inside/outside locks or latches on all bathroom facilities between rooms.

2. The following standards are established as the minimum amount of furnishings for individual transient quarters to assure a comfortable living space comparable to a commercial hotel/motel:

| Item | Quantity | Basis of Issue |
|---|---|---|
| Ash tray | 1 | per unit |
| Basket, wastepaper | 1 | per room |
| Bath mat, cloth | 1 | per bathroom |
| Bathroom shelf space (20-inch minimum or vanity) | 1 | per bathroom |
| Bedspread | 1 | per bed |
| Bed (with spring and mattress) | 1 | per person |
| Blanket | 1 | per bed (extras as required by local climate) |
| Chair, easy | 1 | per unit |
| Chair, desk | 1 | per desk |
| Clock radio | 1 | per unit |
| Closet space or wardrobe | 1 | per person |
| Clothes hangers | 12 | per person |
| Coffeemaker | 1 | per unit |
| Cover, mattress | 1 | per mattress |
| Cover, pillow | 1 | per pillow |
| Desk or desk/chest unit | 1 | per unit |
| Dresser or chest of drawers | 1 | per unit |
| Electric outlet near bathroom mirror | 1 | per bathroom |
| Lamp, table | 1 | per night table |
| Lamp, desk | 1 | per desk |
| Lamp, floor | 1 | per unit |
| Mirror (full length) | 1 | per unit |
| Mirror (well-lighted) | 1 | per bathroom |
| Pad, mattress | 1 | per bed |
| Pictures, framed | 2 | per unit |
| Pillow, bed | 1 | per bed |

| Item | Quantity | Basis of Issue |
|---|---|---|
| Pillowcase | 1 | per pillow |
| Rack, luggage | 1 | per unit |
| Refrigerator | 1 | per unit |
| Rug | 1 | per room, reasonable coverage |
| Sheet, bed | 2 | per bed |
| Shower curtain | 1 | per bathroom |
| Table, night | 1 | per bed |
| Telephone | 1 | per room |
| Television, color | 1 | per unit |
| Towel rack | 1 | one per person |
| Window coverings: shades, blinds or drapes | 1 | per window |

2504. TRANSIENT AIRCREW QUARTERS. When the average daily volume of transient aircrews warrants specific quarters, Marine Corps air stations may designate aircrew quarters to meet requirements for minimum ground time and uninterrupted rest. Such quarters must be available for all transient aircrew personnel regardless of the parent organization or service. Any duty transient personnel may be assigned to these quarters when other transient facilities are full or otherwise not available. Certificates of nonavailability will not normally be issued until all transient facilities, including transient aircrew quarters, are full. Aircrew quarters are operated as part of the transient activity without separate accounting procedures.

2505. CERTIFICATES OF NONAVAILABILITY OF QUARTERS

1. Certificates of nonavailability of quarters or endorsement of orders are provided when adequate Government transient quarters (owned or contracted) are not available for military and DoD civilian personnel on TAD orders. Personnel are not provided with certificates when they occupy inadequate Government quarters voluntarily, or involuntarily due to military necessity. A certificate of nonavailability should be provided to personnel who elect to use an MWR managed transient lodging facility "hostess house" when adequate Government transient bachelor quarters are not available. MWR managed transient lodging facilities are not considered "Government quarters" for purposes of computing pay and allowances and their use is always on a voluntary basis.

2. A certificate of nonavailability should be provided when quarters are available but are impractical for use for special reasons. The billeting office should indicate the reason that available quarters cannot be used when providing certificates of nonavailability.

a. Lack of transportation.

b. Excessive distance between the meal facility and place of lodging or place of duty, which would be lessened by use of off-base housing.

3. If unique or specialized billeting requirements are requested by an individual or by a person in charge of a crew, team or a group traveling together, and no statement to support this request is contained in the travel orders, certificates will not be provided if adequate quarters are available.

4. Postdated certificates of nonavailability may be furnished to travelers who failed to obtain certificates prior to departure from the activity, if in fact adequate quarters were not available.

2506. CONTRACT TRANSIENT QUARTERS. The use of contract transient quarters may occasionally reduce per diem expenses for official duty TAD personnel when on-base quarters are not available. Activity commanders should be aware that contracting for transient quarters is an available option; and they should budget for demand-type contracts for off-base commercial quarters whenever the daily per person cost is less than the average cost of lodging payable under the JTR.

1. Contracting. Contract transient quarters are obtained through the local purchasing and contracting officer. Representatives of the activity commander, including the bachelor housing officer, a medical officer or environmental health inspector, and the contracting officer should initially visit establishments being considered for contract award to ensure the following:

a. Quarters meet the minimum standards of adequacy contained in paragraph 2106, and the applicable public health/environmental standards.

b. Adequate meal facilities are available during reasonable hours for three meals a day, within a reasonable walking distance or with transportation provided.

c. Commercial transportation, laundry facilities, and entertainment are reasonably available to occupants.

2. Eligibility and Funding. Use of contract transient quarters is restricted to the following personnel:

a. Active duty and Reserve military personnel and DoD civilian personnel participating in Joint-Chiefs-of-Staff-directed exercises, and Federally Mobilized Reserve Personnel. Funding is the responsibility of the host installation.

b. Inactive Reserve transient personnel traveling on funded TAD orders. Funding is the responsibility of the commander who issued the orders. Such personnel are assigned to quarters only when the parent Reserve organization has made advance arrangements with the appropriate billeting office for reimbursement of expenses and has identified, by name, those personnel to be billeted.

c. Active duty military and DoD civilians traveling on funded TAD orders. Funding is the responsibility of the commander who issued the orders. These personnel will be eligible only when the parent command has provided the appropriate billeting office with a fund citation authority in advance of the TAD.

3. Utilization

a. Contract quarters are used only when all transient quarters are fully occupied by other duty transients. If nonduty transients are occupying on-base transient quarters, they are required to vacate not later than the following day to accommodate the billeting requirements of duty transients. Once billeted in contract transient quarters, transient personnel should not be required to move to on-base quarters unless they are on an extended period of TAD (one week or more remaining on their scheduled duty) and only when they can be accommodated on base for the entire period remaining on their scheduled TAD.

b. The activity commander is responsible for the following:

(1) Budget and control of operations and maintenance funds for contract transient quarters.

(2) Assignments and terminations of eligible personnel.

(3) Recordkeeping sufficient to validate the accuracy of contractor billings.

(4) Periodic review of contract quarters utilization records to ensure that contract quarters are used only when on-base assets are not available.

2507. FINANCIAL MANAGEMENT OF TRANSIENT QUARTERS. The administration of bachelor transient quarters is a command function supported with appropriated funds. A "billeting fund" is a Nonappropriated Fund Instrumentality (NAFI) established to augment and enhance the transient billeting services provided by an activity. Its primary purpose is to buy goods and services that cannot be purchased with appropriated funds. This paragraph provides guidance for the administration of a NAFI billeting fund. Refer also to the MWR Policy Manual, MCO Pl700.27 for additional guidance applicable to all USMC nonappropriated funds (NAF).

1. Each activity commander will establish and administer a NAFI billeting fund for receiving and disbursing monies collected through approved service charges. Requests for exception to this policy require approval by the CMC (LFF).

2. Due to the broad scope and complexity of Marine Corps billeting funds, activity commanders are granted broad authority to determine how to best accomplish billeting fund accounting within the guidance contained in NAVSO P-3520, Financial Management Policies and Procedures for Morale, Welfare and Recreation Programs. Commanders with large billeting funds are encouraged to

take advantage of the efficiencies to be gained from requiring their billeting fund on a reimbursable basis. However, under no circumstances will a billeting fund be established as merely as subaccount to another fund. A billeting fund will always be established as a separate NAFI.

3. NAVSO P-3520, Financial Management Policies and Procedures for Morale, Welfare and Recreation Programs, prohibit appointment of, as a manager or custodian of nonappropriated funds, any individual who is responsible for either the receipt or disbursement of appropriated funds. Accordingly, staff cognizance over and responsibility for administration of the billeting fund shall not rest with the local appropriated fund fiscal officer/comptroller. A separate individual, normally under the cognizance of the AC/S, Facilities or the G-4, will be appointed as custodian to administer the fund.

4. Billeting funds will operate as self-sustaining, NAF fiscal entities established to provide services to eligible personnel and, as such, are instrumentalities of the U.S. Government. They will operate under official regulations issued by the CMC and are subject to the following restrictions:

a. Billeting funds shall not be operated for the financial profit of any person or group or combination of persons.

b. No individual shall have any financial interest or right, in any manner whatsoever, in the operation of a fund.

c. The CMC is successor in interest to any disestablished billeting fund.

d. Billeting funds will not be contributed, loaned, or transferred to other nonappropriated or appropriated fund instrumentalities.

2508. BILLETING FUND ADMINISTRATION. Billeting funds shall be administered and accounted for per NAVSO P-352O and SECNAVINST 7000.23.

1. The billeting fund will be administered as a separate financial entity to serve as a depository for money collected from appropriate charges. Management Program Code 821 will be used to identify bachelor transient quarters, and does not include temporary lodging facilities.

2. Subaccounts measure revenue derived from and expenses incurred by elements of an operation and the financial impact of each on the overall performance of the fund. Separate financial statements are not required for each subaccount. Authorized subaccounts for billeting funds are:

a. Distinguished guest quarters.

b. Transient officer quarters.

c. Transient enlisted quarters.

d. Permanent party quarters.

3. The financial goal of the billeting fund is overall self-sufficiency and not profit generation. Sufficient-revenue should be generated by the billeting fund to provide for direct operating expenses, administrative overhead expenses, training of NAFI employees, and acquisition/replacement of capital assets either not authorized or not available from appropriated funds. Sufficient reserves may be generated in a 5-year financial program for major capital expenditures not authorized by or available from appropriated funds.

4. Activity commanders shall monitor the operation of the billeting fund and adjust service charges, as necessary, to preclude either insufficient or excessive funds. Normally, rates will be adjusted at the end of each fiscal year based on an analysis of the billeting fund's financial statements from the previous year. A proposed rate schedule will be included as a display in the annual billeting fund budget submission. CMC approval is required when service charges exceed the rate guidelines provided in paragraph 2509.2.

5. In all cases involving suspected misappropriation, larceny, fraud, or robbery, the activity commander shall request an investigation by the Naval Investigative Service.

## 2509. BILLETING FUND REVENUES

1. Service Charge Policy. The activity commander shall ensure that service charges are collected to generate revenue necessary to meet expenses and reserves. Service charges are established to pay for maid services, supplies (except cleaning supplies), enhanced amenities and other nonappropriated costs incident to the operation of the transient quarters. Where no service is provided, either maid service or enhanced amenities, no charge may be levied. Service charges will not be used as a means of collecting rent or recouping BAQ. Activity commanders shall ensure that all transients are informed of the service charge rates. A schedule of established service charges shall be posted in a prominent place. Figure 2-9 provides a list of personnel required to pay service charges. Service charges may be collected in advance.

2. Rates. As a general rule, service charge rates should be commensurate with the level of service provided. Service charges in excess of the guidelines listed below require specific written approval from the CMC.

| | |
|---|---|
| Enlisted Quarters: | $15.00 |
| Officer Quarters: | $20.00 |
| Distinguished Guest: | $30.00 |

a. Permanent Party Bachelor Housing Residents. Service charges for permanent party residents shall be established at the minimum amount necessary

to pay for elected maid service within the confines of their personal living spaces. Permanent party residents, including geographical bachelors, have the option to clean their own living area and not pay a service charge for maid service. Activity commanders shall require inspections of quarters to ensure that proper, standards of cleanliness are maintained. These inspections should be held in conjunction with other facility inspections to the maximum extent practicable. If a member does not maintain assigned quarters in an acceptable manner, appropriate action should be taken, to include the mandatory use of maid service.

b. Official Duty/Transient Personnel. Service charges will be levied on military and civilian personnel on TAD orders. The original orders of transient personnel shall be endorsed indicating the number of consecutive days and inclusive dates of residence in transient quarters and the amount of the service charge paid. Transient personnel on official duty who are not authorized per diem allowance for lodging must personally bear the service charge expense.

c. Unit Deployment Program (UDP). Service charges for unit deployment personnel will be commensurate with the level of service provided by the billeting fund, but will not exceed the guidelines of paragraph 2509.2 without specific written authority from the CMC.

d. Reserve Components. Members of the Marine Corps Reserve or the Reserve components of other Armed Services performing active duty training or inactive duty training shall be required to pay service charges commensurate with the level of service provided by the billeting fund. Members belonging to mobilization (volunteer) units should be billeted in permanent party quarters where they will not be required to pay service charges unless maid service is elected. If orders read "No pay or quarters allowance," members should be billeted in permanent party quarters unless they elect to reside in transient quarters at their own expense.

e. Midshipmen/Cadets. Naval Reserve Officer Training Corps (NROTC) midshipmen, U.S. Naval Academy midshipmen, Coast Guard midshipmen, West Point cadets and Air Force Academy cadets shall be required to pay service charges commensurate with the level of service provided by the billeting fund. The following service charge billing procedures shall be observed:

(1) The cost of services provided to NROTC midshipmen undergoing training shall be charged to the Chief of Naval Education and Training, Reserve Personnel (Navy funds), as reimbursement to the appropriate billeting fund.

(2) Service academy midshipmen and cadets receiving per diem shall be required to pay service charges directly to the billeting fund.

(3) For midshipmen and cadets not receiving per diem, the cost of services provided shall be billed to the superintendent of the appropriate service academy.

f. Foreign Military Members. Members of foreign military service shall pay service charges commensurate with the level of service provided by the billeting fund.

## 2510. BILLETING FUND EXPENSES

1. With the exception of labor costs for maid service and costs incident to operating transient quarters, all other operation and administration costs will be supported by appropriated funds as provided by NAVCOMPT Manual, Volume 7. Administrative services and supplies, equipment and supplies for cleaning and maintenance, procurement of room linens and equipment, laundry and dry cleaning costs are appropriated fund expenses.

2. Maid and Custodial Services

a. Custodial service in common-use areas such as offices, hallways, lobbies, dayrooms, gamerooms, lounges, and laundry rooms is an appropriated fund expense. Maid service within the confines of individual personal living areas is a nonappropriated fund expense.

b. Maid and custodial services for permanent party personnel and transients may be provided by:

(1) NAF civilian employees. (The NAFI must be reimbursed from appropriated funds for custodial service in common-use areas.)

(2) NAF financed contract cleaning service. (The NAFI must be reimbursed from appropriated funds for custodial service in common-use areas.)

(3) Appropriated fund civilian employees. (U.S. Treasury must be reimbursed by the NAFI for maid service in personal living spaces.)

(4) Appropriated fund financed contract cleaning service. (U.S. Treasury must be reimbursed by the NAFI for maid service in personal living spaces.)

(5) If custodial workers are local club system NAF employees, employer’s share of retirement and insurance costs will be reimbursed to the Marine Corps Morale Support Fund, CMC (MSF).

c. Under no circumstances will enlisted personnel perform janitorial services unless the services are performed voluntarily as appropriately compensated off-duty employment.

3. Laundry and Dry-Cleaning Services. Government-owned room linens and furnishings will be procured, laundered or dry-cleaned with appropriated funds.

The terms "room linens" and "furnishings" include bed linens, towels, washcloths, bathmats, shower curtains, drapes, blankets, rugs, and similar items used in conjunction with outfitting living spaces.

4. Labor. Activities should rely on regular part-time and intermittent part-time personnel to minimize labor costs. NAFI employees who provide maid and custodial services are governed by NAFI personnel regulations and their wages are based on the DoD are a wage surveys. Where possible, to reduce recordkeeping expenses, billeting fund managers should investigate the feasibility of purchasing labor services from other NAFI's. In such cases, expenses for NAFI personnel (to include insurance, retirement benefits and Federal Insurance Contribution Act (FICA), etc.) will be reimbursed to the proper NAFI.

5. Improvements to Transient Quarters

a. In recognition of budgetary, manpower, and facility limitations, this Manual stipulates only those minimum requirements and services to be provided to transient personnel and the MWR Policy Manual, MCO Pl7O0.27. Activity commanders are encouraged to reasonably exceed these minimums within local capabilities.

b. Appropriated funds should be used to the maximum extent possible to improve transient quarters. When appropriated funds are not authorized or not available, nonappropriated funds may be used. Routine operation and maintenance of transient billeting facilities is an appropriated fund expense and the activity commander is responsible for budgeting sufficient appropriated funds to support the transient billeting mission.

c. All major modernization, construction, improvement, and repair projects, including furniture procurement/replacement and landscaping should be identified and listed on a construction DD Form 1391 (FY 19___ Military Construction Project Data). Additionally, the DD Form 1391 should reflect not only the scope of the intended project but list any previous work accomplished within the last 18 months. The scope of such projects should be sufficient to preclude the need for similar work for at least 18 months.

d. Billeting funds are not intended for use in major construction or alterations. Proposals for such projects should be critically reviewed on a case-by-case basis by the activity commander and forwarded to the CMC (@LFF) for approval.

## 2511. BUDGETS AND FINANCIAL STATEMENTS

1. Annual NAFI budgets are to be prepared per NAVSO P-3520, chapter II. The billeting fund budget will include:

a. An operating budget.

b. A cash flow budget.

c. A balance sheet projection.

d. A 5-year projected capital expenditure budget.

e. A proposed schedule of service charge rates for the budget year.

The completed budget, reviewed and approved by the activity commander, should be on file at the activity and available for audit and review not later than 1 September of the preceding year. A copy of the budget, approved by the activity commander, will be provided to the CMC (LFF) for information.

2. Annual billeting fund financial statements will be completed and copies forwarded to the local NAFI auditor and the CMC (LFF), to arrive not later than l November. The financial statements should include:

a. A Balance Sheet.

b. Statement of Reconciliation of Net Worth.

c. Income and Expense Statement.

d. Appropriated Fund Support Summary (Schedule A to the Income and Expense Statement).

e. Funds Invested/Validated Commitments Report.

3. Quarterly billeting fund financial statements will be prepared and will display the budgeted amounts, actual amounts, and the variance. The completed quarterly financial statements, with the activity commander’s reviewing endorsement, should be on file at the activity and available for audit and review not later than the 20th of the month following each fiscal quarter. A copy of the 2d quarter and the year-end financial statement will be provided to the CMC (LFF) for information, review and analysis.

4. The international Balance of Payments (IBOP) Program requires nonappropriated billeting fund financial data. The reporting requirement extends to all responsible officers having cognizance over activities outside the U.S. responsible for the establishment and operation of nonappropriated billeting fund activities. The Accounting Report 2 will be completed and forwarded to the CMC (LFF) per the instructions contained in MCO 7020.8C, to arrive not later than the 20th of the month following each fiscal quarter. Report Symbol DD-7020-08 has been assigned to this report.

5. NAF procurement will be accomplished per the provisions of NAVSO P-3520. In no instance will the custodian of the billeting fund perform procurements unless

an exception to this restriction has been approved by the CMC. When feasible, a centralized NAF procurement office or the appropriated fund purchasing and contracting office shall be used.

6. Billeting funds are included in the mandatory requirement for NAFI's to participate in the NAF Composite Insurance Program. The purpose of the Composite Insurance Program as conceived and adopted by the Marine Corps is to provide the most comprehensive insurance program consistent with equitable premium costs for the protection of the assets and interests of the individual activities against insurable losses. Coverage includes such areas as comprehensive public liability, fidelity, physical property and worker's compensation. All participating activities finance the cost of the program from @NAF's. Premium rates are established for each activity based on-worldwide Marine Corps exposure factors. Billeting funds will comply with MCO P1741.7 which requires that an identification number for the billeting fund and an insurance manual be obtained from the CMC (MSS). Correspondence regarding billeting, requests for forms and request for additional guidance will be sent to the CMC (MSS).

7. Procedures for the control of cash receipts are provided in NAVSO P-3520.

8. Billeting funds will be audited annually by the Marine Corps Nonappropriated Fund Audit Service per the provisions of MCO 7510.2.

| Type of Resident | Type of Accomodation | Service Charge | Fair Market Rental Charge | No Charge | Notes |
|---|---|---|---|---|---|
| Permanent Party Military (Bona fide and Geographical Bachelors | Permanent Party | | | X | #1 |
| Permanent Party DoD Civilian | Permanent Party | X | X | | #2 |
| Nonduty Status Personnel Military or DoD Civilians Not Forfeiting BAQ. | Permanent Party or Transient | X | X | | #3 #4 |
| Official Duty Transients Military and DoD Civilian | Transient | X | | | |
| Reserve Components on ACDUTRA/Drills not Receiving Pay Allowances | Transient | X | | | |
| Midshipman/Cadets | Transient | X | | | |
| Non-Government Civilians | Permanent Party or Transient | X | X | | #5 |
| Official Guests of Activity Commander | Permanent Party or Transient | | | X | #6 |
| Retired Military | Permanent Party or Transient | X | X | | #4 |

Notes:

1. If optional maid service is elected, a service charge may be assessed.

2. Fair market rental rates will be waived in foreign areas where quarters are provided to civilian employees in lieu of their housing allowance.

3. Bachelor quarters may be occupied on a temporary space-available basis.

4. At the discretion of the activity commander, fair market rental charges may be waived for active duty military members on leave and for retired military personnel.

5. Includes American National Red Cross (within the U.S. and its Territories), Navy Relief Society, USO, technicians, contractors, station entertainers and official visitors who are not offical guests of the CMC or the activity commander.

6. Limited to unpaid guest speakers, visiting civilian chaplains and others providing a service to the Command without compensation.

Figure 2-9.--Service Charge Chart.

CHAPTER 2

SECTION 6: ALLOWANCES

2600. BASIC ALLOWANCE FOR QUARTERS (BAQ)

1. Policy. Maximum practical occupancy is to be made of all adequate Government bachelor quarters before BAQ is authorized. Therefore, members not qualifying as exceptions as listed in paragraph 2600.3, may not be authorized BAQ or per diem if adequate Government quarters are available. Generally, corporals and below without dependents will not be authorized BAQ when Government bachelor quarters, regardless of adequacy, are available at their permanent duty station.

2. Procedures /Authority

a. Authority for entitlement to BAQ rests with the activity commander within the guidelines contained in this Manual and the DoD Pay Manual. Accordingly, activity commanders shall establish control procedures to preclude unwarranted BAQ authorizations.

b. Entitlement to BAQ must be determined on a case-by-case basis to ensure that:

(1) BAQ is not authorized for members who are required to reside aboard the activity for reasons of military necessity.

(2) Adequate Government quarters are not available or, if available, the member qualifies as an allowable exception.

(3) Off-base quarters are available, meet the Marine Corps standards of adequacy, and have been certified as such by the activity housing referral service prior to authorization of BAQ. All permanent party personnel drawing BAQ will have an entry made in their service record book (SRB or OQR).

(4) Off-base residency of the member is in the best interests of the Marine Corps and the health and welfare of the member.

c. The activity commander will give appropriate written notice to each member entitled to BAQ, and may use the following:

(l) Adequate Government quarters will be made available to you during your tour of duty. You should make temporary off-base arrangements.

(2) Adequate Government quarters may be made available to you within 30 days. You should make temporary off-base arrangements.

(3) Adequate Government quarters will not be made available to you during your tour of duty. You should make permanent off-base arrangements.

d. BAQ may be terminated by assignment of adequate Government quarters when the activity commander determines that the Marine's continued off-base residency is not in the best interest of the Marine Corps. Any such actions should take into consideration the provisions of paragraph 2101.1.

3. Extraordinary Instances of BAQ Authorization. The activity commander may waive the involuntary assignment policy and authorize off-base residence and receipt of appropriate BAQ in the following instances:

a. members already drawing BAQ who have accumulated a significant quantity of furniture, and if required to live on base, would have to sell their furniture at a considerable loss, or store it at a considerable expense.

b. Members who sustain the loss of their only dependent through death, divorce, or legal separation. These persons will be granted a 90-day exemption from the assignment to on-base Government quarters. If such a member owns the home in which they reside, in the vicinity of their assigned duty station, they may be exempted from on-base residency.

c. Females who have reached the 6-month of pregnancy and who desire to establish off-base residency prior to childbirth. A certificate from the medical officer attesting to the estimated delivery date is required.

d. For other good and sufficient reasons at the discretion of the activity commander.

## 2601. TEMPORARY LODGING ALLOWANCE

1. Temporary lodging allowance (TLA) (application only outside CONUS) is authorized for the purpose of partially reimbursing a member for the more-than-normal expenses incurred during occupancy of hotels or hotel-like accommodations, and for expenses for meals obtained as a direct result of the use of temporary lodgings which do not have facilities for preparing and consuming meals. The TLA applies in the following instances:

a. Upon initial arrival (reporting) at a permanent duty station outside the United States, and pending assignment of Government quarters or pending completion of arrangements for other permanent living accommodations when Government quarters are not available.

b. When, for reasons beyond the control of the member, a member once established in permanent housing in the vicinity of the member's duty station must vacate such housing, permanently or temporarily, and use hotel or hotel-like accommodations in the vicinity of the permanent housing or pending reoccupancy of the formerly occupied permanent housing. Such circumstances must be determined and verified by the activity commander.

c. Immediately preceding departure on a PCS outside the United States and after Government quarters are in fact vacated in connection with PCS orders or after surrender of other permanent living accommodations.

2. Activity commanders have the responsibility to administer temporary lodging allowances by:

a. Ensuring that existing Government transient quarters are used to the fullest possible extent by members and/or dependents upon arrival at, and departure from, the duty station.

b. Requiring that the TLA be terminated if suitable Government quarters are declined.

# CHAPTER 2

## SECTION 7: INSPECTIONS

2700. GENERAL INFORMATION. Activity commanders have the responsibility to ensure that assigned living spaces are properly maintained and cleaned, that their personnel are properly housed per the MSA established by DoD and the CMC, and that Government bachelor quarters provide a safe and secure place to live. To meet these obligations, periodic inspections of bachelor quarters must be conducted.

2701. COMMAND INSPECTION RESPONSIBILITIES

1. Activity Commander’s Responsibilities

a. Promulgate command inspection procedures for bachelor housing facilities at your activity.

b. Initiate, coordinate, and conduct periodic inspections of all bachelor quarters.

2. Tenant Commander’s Responsibilities

a. Ensure that your personnel are adequately housed.

b. Conduct joint inspections in conjunction with troop movements and deployments or mass reassignments of tenant commands to other quarters.

c. Inspect quarters assigned to your personnel to ensure that Government property is properly maintained, and that no contraband (flammable materials, live munitions, or illegal drugs) have been introduced. Marine Corps policy also prohibits the introduction of alcoholic beverages into bachelor quarters occupied by sergeants and below. Further, the display of pornographic/obscene materials is prohibited in bachelor quarters.

2702. BACHELOR HOUSING/BILLETING DIRECTOR RESPONSIBILITIES

1. Conduct periodic inspections.

2. Minimize the number of inspections and room entries by consolidating with scheduled command inspections to the maximum extent practicable.

3. Review inspection reports of discrepancies and coordinate corrective actions.

## 2703. ESTABLISHING AN INSPECTION PROGRAM

1. The activity commander's bachelor housing policy directive will include detailed policy for inspecting bachelor quarters. Inspection policy should include the following minimum essential information:

a. Inspection responsibilities of the host commander, tenant commander, and the bachelor housing management staff.

b. Schedule and frequency of inspections.

c. Reports required.

d. Corrective action procedures.

## 2704. SAFETY AND SECURITY INSPECTIONS

1. To meet their responsibility to provide a safe and secure living environment in Government bachelor quarters, commanders must include the following safety and security provisions in their inspection program:

a. During routine inspections, identify and minimize conditions which may cause a fire or accidental injury.

b. Take action to reduce or prevent the occurrence of personal injury and damage or loss of property.

c. Provide periodic safety and security training to improve the ability of staff members and residents to recognize hazardous or insecure conditions.

2. Periodically, command inspectors should be augmented by specialists in the fields of fire safety, security, preventive medicine, and facilities maintenance. To the maximum extent possible, these inspectors should participate in regularly scheduled command inspections; however, it may be necessary to schedule them separately when schedules conflict.

## 2705. KEY CONTROL PROCEDURES

1. General. The activity commander will designate a responsible officer, normally the bachelor housing manager, to be in charge of bachelor housing key security. This function is of major importance to the security of the residents' possessions and of Government property. Key control is the cornerstone of physical security. If keys, particularly master keys, are compromised or lost, it jeopardizes bachelor quarters security. An effective key control system is essential to reduce direct loss of Government property and claims against the Government due to theft.

2. Key Security Procedures. Minimum key security procedures will include the establishment of a general key locker and a master key locker. Decentralization

of key control will be at the discretion of the activity commander; however, it is recommended that master key control be retained at battalion level or higher. General key lockers may be established in each BEQ building. The following procedures will be strictly observed:

a. General Key Locker. The general key locker will contain all keys not in the master key locker or in the possession of bachelor housing occupants. The bachelor housing managers, clerks, and assistants will have access to the general key locker. A logbook or custody card system will be established with each general key locker to document issue and return of keys. Figure 2-10 shows recommended column headings for a typical key control log book.

b. Master Key Locker. The master key locker will contain all working masters. Only the bachelor housing manager or the designated representative will have access to this locker. The master keys in this locker should have large tags or rings to prevent them from being misplaced. The following special security measures will be observed to protect master keys:

(1) Master keys will never be signed out to individual occupants. The authorized custodian of the master key must go the where the key is needed.

(2) Master keys will never be taken from the immediate area of the quarters which they serve. If the custodian of the master keys must leave his place of duty, then the master keys will be returned to the master key locker or to next higher level of control. They will be signed out at the beginning of each work day and signed back in when the work day is over.

(3) Master key issue will be recorded in a special log (see sample format at figure 2-11) and master keys will be issued only to those persons authorized in writing by the command. A change of custody of master keys will always be documented by two signatures: the signature of the individual who surrenders the keys and the signature of the individual who acknowledges receipt of the keys. When master keys are in the custody of a staff duty officer or staff duty NCO, posting and relief log entries must acknowledge the passage of custody of the master keys.

| Bldg No | Room No | Date Issued | Issued To Signature | Date Returned | Received By |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Figure 2-10.--Sample Key Control Logbook Format.

3. Key Loss procedures

a. The bachelor housing manager will document the circumstances surrounding the loss of keys before issuing a duplicate key. The loss may be documented by a log book entry or by submission of a written statement by the individual concerned. The activity commander, at the request of the bachelor housing/billeting officer, may direct an investigation of the loss, particularly if thefts are involved. If three keys to the same lock have been lost, the bachelor housing/billeting officer will direct that the locksetting be changed. Individuals may be subject to disciplinary action for the negligent loss of bachelor housing keys.

b. The loss of a master key will be immediately reported to the bachelor housing/billeting officer. The bachelor housing/billeting officer will investigate the loss and determine if it is necessary to change all of the locks that the lost master key can open.

| Bldg No. | Key No. | Date/Time Issued | Issued To: Print Name | Issued To: Signature | Date/Time Returned | Recd By: Signature |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Figure 2-11.--Sample Master Key Logbook Format.

## SECTION 8: BILLETING FUND

### 2800. INTRODUCTION

1. Each activity commander may establish a billeting fund NAFI. This NAFI is to provide services similar to hotel/motel accommodations but in transient government quarters for personnel traveling on official business for the U.S. Government and who are required to reside in Government quarters to reduce per diem costs. Other personnel may reside in these quarters on a space available basis. The Marine Corps goal is to provide transient quarters similar to good hotel or motel accommodations. Activity commanders are to use the billeting fund to procure amenities, furnishings, facilities, and services similar to those provided in good hotels that cannot be provided with appropriated funding. In supplementing appropriated fund support to transient billeting, NAF's assist, extend, and enhance the supplemental base mission of transient billeting. These NAF's are generated by charging patrons for the amenities, facilities, furnishings, and services that are provided in addition to that procured with appropriated funds.

2. Nonappropriated billeting funds are designed to purchase goods and services that appropriated funds cannot. DoD 4165.63-M explains that billeting fund service charges shall be established to cover the cost of maid and custodial services and amenities not available from appropriated funds. Such charges also may be used to help defray the costs of upgrading housing services used for transient personnel, including installation of telephones, televisions, decorations, and other amenities comparable to commercial hotel and motel accommodations.

3. All collected funds must be maintained in a NAF account and used for Marine Corps transient billeting fund guests. SECNAVINST 7000.23A states that money generated by an NAFI can only be used for the collective benefit of the patrons who generated the money. Billeting funds may only be used for services and amenities which benefit the billeting fund transient quarters guest. Benefits bay accrue to the permanent bachelor resident residing in Government bachelor quarters. In addition to the transient traveler, these benefits have been determined to be acceptable as long as the permanent resident is not the sole recipient of the benefit.

4. NavCompt Manual, volume 7, paragraph 075524.8, classifies billeting funds within supplemental mission services. Supplemental mission NAFI's provide a mechanism for collecting and using

NAF's in areas such as military museums, in-flight services and billeting, or housing. These NAFI's, while subject to the same rules of operation as MWR NAFI's, are separate and distinct from NAFI's associated with the MWR program. Aligned with category C MWR activities, supplemental mission services NAFI's are entitled to limited appropriated fund support.

## 2801. COMMON MARINE CORPS TERMS

1. Definitions. The following terms are defined as they relate to DoD and Marine Corps Bachelor Housing:

a. Amenities. Anything that adds to the customer's comfort or convenience. Examples of which are upgraded furnishings, room telephones and televisions, private baths, alarm clocks, enhanced landscaping, transportation to and from the airport, computerized reservation and billing services, FAX machine service, in-room food and beverage service, structural improvements to upgrade the facility to a comparable hotel or motel. The above examples are not intended to be all inclusive. DoD 4165.63-M, chapter 5, provides further guidance.

b. Appropriated Funds. Appropriated funds are monies made available for obligation and expenditure by an act of congress for numerous specific purposes.

c. Category C: Business Activities Funding for MWR. This type MWR activity primarily benefits the individual service member. These activities are similar to those which are operated for profit or by private enterprise in the civilian sector. Business activities have a significant capacity to generate revenue, and revenues from authorized appropriated fund support are limited. Category C activities are primarily dependent on NAF's to sustain operations. All costs directly related to the sale of merchandise or services and to the internal management (e.g., NAF financial management, NAF personnel management, NAF forms, NAF payroll documents and time clocks/sheets) of NAFI's should be financed using NAF's, regardless of the category of activity. See NavCompt Manual, NAVSO P-3520, and MWR Policy Manual for additional guidance.

d. Custodian of Billeting Fund. A custodian is an individual appointed by written authority to exercise administrative and executive control of the nonappropriated billeting fund and charged with accountability thereof. See NAVSO P-3520 for further guidance.

e. Custodian of Housekeeping Section. Personnel employed to do janitorial work for transient billeting, often assigned to the Maid/Housekeeping Section of transient billeting.

f. Federal Instrumentality. A Federal instrumentality is a fiscal entity established on Government property, under the jurisdiction of competent authority, for the purpose of rendering services or otherwise supporting official Government activities or operations. Such instrumentalities may be wholly or in part supported by appropriated or NAF's and are entitled to the sovereign immunities and privileges of the United States as provided in the Constitution, the statues, and in international law, treaties, and agreements with foreign governments. See NAVSO P-3520 for further guidance.

g. Geographic Bachelor. Service member collecting BAQ (at the with dependents rate), authorized to be accompanied by dependents, eligible for family housing, who for personal reasons other than availability of housing at the permanent duty location, is not accompanied by dependents. Also see appendix A and NAVSO P-6048, part 3.

h. Goods. Movable property, merchandise, or wares. Examples of which are administrative supplies, furnishings, televisions, radios, telephones, and automobiles.

i. Government Quarters. Family and unaccompanied personnel housing units that the DoD owns, leases, obtains by permit, or otherwise acquires. See DoD 4165.63-M for further guidance.

j. NAF. A NAF is a fiscal instrumentality of the Federal Government, authorized by proper authority, and established for the purpose of administering nonappropriated monies.

k. NAF's. Cash and other assets received by NAFI's from sources other than monies appropriated by the Congress of the United States. NAF are government funds; they are used for the collective benefit of military personnel, their dependents, and authorized civilians who generated them. These funds are separate and apart from funds that are recorded in the books of the Treasurer of the United States.

i. NAF Activity. A NAF activity is any duly authorized program, facility, or service conducted, operated, or provided by and in the name of an NAF. Such activities are not incorporated under the laws of any State or the District of Columbia.

m. Program Manager. A command or office authorized by the Secretary of the Navy to administer technical direction and coordinate administrative and managerial controls over a group or category of NAF's. The CMC is the Program Manager for all Marine Corps billeting funds.

n. Recreation Lodging Facilities. Housing facilities operated by the MWR primarily for rest and recreation purposes. These facilities may be occupied by military personnel and their families, relatives, and guests. Recreation lodging facilities include cabins, chalets, cabanas, and trailers, and are not part of the military housing inventory.

o. Revenue-Producing Fund. A self-sustaining NAF instrumentality established to sell merchandise and services to military and civilian personnel at military installations and to provide financial support to welfare funds.

p. Service. In the context of transient billeting, those efforts that raise the level of accommodation to that of a good hotel or motel.

q. Supplemental Mission Funds. Supplemental mission NAFI's provide a mechanism for collecting and using NAF's in areas such as military museums, in-flight services and billeting, or housing. These NAFI's, while subject to the same rules of operation as MWR NAFI's, are separate and distinct from NAFI's associated with the MWR program. Aligned with category C MWR activities, supplemental mission services NAFI's are entitled to limited appropriated fund support. See NavCompt Manual for further guidance.

r. TLF. Specifically identified as interim housing facilities operated by MWR to offer short-term housing accommodations for occupancy by military members, their families, and guests for which a cash charge is levied without charge against the quarters allowance of the occupants. TLF's are not part of the military family housing inventory. TLF's do not include facilities used primarily for rest and recreation purposes. TLF's may be occupied by military personnel and their families on PCS orders or leave, and their relatives and guests. Military members and DoD personnel on TAD orders may occupy TLF's, but these facilities are not considered Government quarters. Installations may call these facilities TLF's, hostess houses, or guest houses. See the MWR Policy Manual for additional information.

s. Transient Personnel. Government personnel traveling on official business normally in a TAD status.

t. Unaccompanied Personnel. Personnel who either have no dependents or who are ordered to a duty station where dependents are not authorized (dependents restricted tour).

## 2802. BASIC SERVICE TO BE PROVIDED

1. Minimum Services. Figure 2-1 of this Manual provides the MSA in relation to room size for transient personnel. MCO 10160.8 provides guidance on garrison property for quarters that are to be

purchased with appropriated funds. Paragraph 2503 of this Manual provides details on specific minimum Marine Corps facilities, services, and supplies for transient quarters. The minimum requirements for transient quarters is a combination of the MSA for space, furnishings (MCO 10160.8) purchased with appropriated funds, and additional items purchased with billeting funds to provide amenities listed in paragraph 2503 of this Manual. Within the Marine Corps, service charges shall provide for the cost of maid/housekeeping, janitorial, management services, and amenities not available from appropriated funds.

2. Relationship to MWR. The transient billeting mission and its NAFI billeting fund is not related to the mission or activities of the Marine Corps MWR program. The billeting fund is a separate NAFI and cannot be merged with other nonappropriated monies such as MWR funds, chapel, or civilian welfare funds. MWR shall not control the management of transient billeting or use of billeting funds. Base MWR resources may be used in transient billeting facilities such as food and hospitality programs and recreational equipment to provide MWR support for Marines residing in transient quarters.

3. MWR Support. Internal support functions required for the daily operation of the command’s transient billeting mission may be obtained from the local MWR on a reimbursable basis. MCO P1700.27, Marine Corps MWR Policy Manual, paragraph 10212 (Support Functions Internal to MWR), provides detailed guidance on support available. Primary support functions that may be used are, but not limited to, accounting, financial management, personnel support, automated data processing, maintenance using NAF’s, and purchasing services. Support functions should be used that best support the transient billeting mission.

4. The sale of snacks and alcoholic beverages in transient quarters is authorized. MWR is responsible for providing this service. Guidance is provided in the MWR Policy Manual. If MWR is enable or unwilling to provide the requested service the CMC (LFF) will provide additional guidance.

## 2803. RESPONSIBILITIES FOR THE BILLETING FUND

1. Headquarters, Marine Corps (HQMC). HQMC’s role, regarding nonappropriated billeting funds, is to set policy, provide management oversight, and act as the program manager. This Manual is the basic guideline regarding policy and transient billeting management issues.

a. The Marine Corps NAF Audit Service will provide audit service to all billeting funds.

b. HQMC does not approve installation billeting fund budgets. It will, however, be provided information on billeting funds and

transient billeting activities to ensure proper management of the Marine Corps transient billeting mission. Paragraph 2511 of this Manual provides additional guidance.

c. Ensure that the billeting fund complies with the General Accounting Office (@GAO) Standards on internal controls and the Marine Corps Internal Management Control Program by advising commands with billeting funds on appropriate procedures.

2. Activity Commander's Responsibilities

a. Each activity commander has the responsibility to ensure transient billeting for TAD travelers. The activity commander is responsible for ensuring that the official government business traveler can obtain temporary quarters on or near the activity to conduct official business. If deemed appropriate by the activity commander, specific bachelor housing quarters may be designated as transient billeting quarters. The activity commander may establish a NAFI billeting fund to upgrade the designated transient billeting quarters over and above the MSA to resemble a hotel or motel with appropriate staff and amenities.

b. Billeting fund administration and supervision is a command function; consequently, commanding officers have the same responsibility for the proper administration of NAF's as for any other functional element of the command. The activity commander has jurisdiction over, and is responsible for the establishment, administration, operation, and financial condition, to include solvency and stability of the nonappropriated billeting fund and will:

(1) Direct the billeting fund operation per policies and procedures as set forth by the program manager (CMC) and as delineated herein.

(2) Review and evaluate financial statements, and where applicable, forward as directed to higher authority.

(3) Appoint a transient billeting director, qualified transient billeting manager, and billeting fund custodian. Individuals responsible for either the receipt or disbursement of appropriated funds or NAF funds will not be appointed as the transient billeting manager or custodian of the billeting fund.

(4) Budget for appropriated funds which are authorized to support the transient billeting mission.

(5) Ensure that technical advice and assistance in the supervision of the billeting fund are obtained from other staff members on matters in which they have specific competence.

(6) Effect corrective action on recommendations made by audit, program managers (CMC), or staff personnel.

(7) Disapprove any recommendation of the custodian or a staff member which is deemed not to be in the best interest of the Marine Corps.

(8) Ensure that the billeting fund is being properly administered and its funds safeguarded, that all income has been received in full and properly recorded, and ensure that all disbursements are made only for authorized purposes.

(9) Designate a successor to the billeting fund custodian for absences due to leave of absence and temporary duty.

(10) Use billeting funds-to provide services and amenities similar to a hotel or motel for transient billeting.

(11) Ensure that key duties and responsibilities, related to the billeting fund, regarding authorizing, processing, recording, and reviewing transactions are separated among individuals. Work shall be assigned so that no one individual controls all phases of an activity or transaction.

(12) Implement the Marine Corps Internal Management Control Program.

(13) Report the establishment or disestablishment of a billeting fund to the CMC (LFF and @FDR).

3. Transient Billeting Directors Responsibilities. This is normally the activity's Assistant Chief of Staff for Facilities, G-4/S-4 and may also be responsible for all bachelor housing aboard the installation. The director shall:

a. Supervise the administration of the transient billeting mission and the billeting fund when established by the command.

b. Ensure that an accounting service is established for the billeting fund. This service can be provided in-house or by the command MWR support activity on a reimbursable basis. Accounting will be accomplished per NAVSO P-3520.

4. Transient Billeting Managers Responsibilities. Supervise all aspects of the transient billeting mission to include the billeting fund.

a. Cause to be put into effect all management policies as directed by the activity commander, the billeting director, and other competent authorities.

b. Employ, discharge, train, and supervise personnel.

c. Prepare necessary budgets per NAVSO P-3520, this Manual, and other applicable directives.

d. Be responsible for all purchasing and contracting. Paragraph 2511.5 of this Manual provides further guidance regarding procurement with NAF monies.

5. Custodian's Responsibilities. The custodian, as a direct representative of the activity commander, exercises executive control over the billeting fund and is charged with the following responsibilities and specific duties and will:

a. Receive, safeguard, disburse, and account for billeting funds and other assets per this Manual and other applicable regulations, directives, and/or manuals.

b. Develop, implement, and maintain an internal control system per current directives.

c. Ascertain that the financial reports are prepared within the timeframe established by HQMC and, where applicable, submitted to the activity commander for approval through the transient billeting manager and director.

d. Ensure the adequate protection of cash in conformity with current directives.

e. Report to the transient billeting manager all billeting fund transactions.

## 2804. APPROPRIATED FUND SUPPORT OF TRANSIENT BILLETING MISSION DIRECT OPERATING COSTS

1. Appropriated Support. There is a distinction between the activity commander's responsibility to support his billeting function and the transient billeting fund. The activity commander is tasked with providing billeting for personnel aboard their installation, this is their billeting function requirement. The billeting fund is concerned with transient billeting and is not related to the billeting of permanent personnel bachelors or families. Transient billeting activities are entitled to appropriated fund support as delineated in NavCompt Manual, volume 7, chapter 5 and MCO P7l0o.8. Transient billeting is considered a supplemental mission NAFI aligned with category C (business) activities and therefore entitled to appropriated fund support. Appropriated funds are authorized to support the following:

a. Personnel performing managerial functions, requiring technical/professional qualifications, or those accountable for appropriated funded resources and the protection of the interest of the Federal Government.

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b. Use of Government-owned vehicles/Government-contracted vehicles, for other than executive control and command supervision.

c. Utilities.

d. Equipment maintenance for Government-owned equipment authorized for or on loan to billeting activities.

e. Janitorial services and supplies in common use areas.

f. Maintenance and repair performed on a recurrent, day-to-day basis; periodic or scheduled work required to maintain and support activity operations.

g. Supplies that are not related to patron amenities.

h. Equipment not related to patron amenities.

2. Appropriated Funds. Appropriated funds should be used to fund all similar items in transient quarters that are provided to permanent bachelor personnel aboard the installation.

a. The following is a more detailed sample of appropriated funds support to Marine Corps transient billeting:

(1) The facility/building.

(2) Building maintenance.

(3) Basic grounds maintenance.

(4) Common area cleaning supplies.

(5) Linen and laundry service.

(6) Basic Government issue bed linens.

(7) Basic carpeting (if provided in other permanent personnel barracks).

(8) Basic window coverings (curtains, blinds, etc.).

(9) Maintenance/repair/replacement of fixture and appliances.

(10) Utilities costs.

(11) Basic furnishing (similar to those for permanent party).

(12) Salary for bachelor housing manager.

b. Budget Development. The transient billeting activity's appropriated fund needs shall be represented in the installation's appropriated fund budget. The bachelor/transient housing director should coordinate with the installation comptroller in developing the transient billeting portion of the installation's budget. Appropriated fund support of transient billeting programs depends on participation during the POM cycle. Transient billeting should be promoted as a mission of the installation commander contributing to the Future Year Defense Program (FYDP) objectives. Bachelor housing directors must ensure that transient billeting input is solicited and issues are addressed during the planning, programming, and budgeting cycles. The budget process is decentralized in that the installation commander determines the resources budgeted to support transient billeting and the relative priority within the installation's budget. In this context, it is essential that a working relationship be developed with the installation comptroller to ensure some degree of visibility and priority is given in the allocation of appropriated resources.

c. Staff Liaison. Liaison should be established with the following staff personnel who provide appropriated fund support for transient billeting: G-1 (military personnel officer), civilian personnel officer (civilian personnel support), procurement/supply officer (supplies and equipment), and the designated facilities management officer (maintenance, repair, construction, and renovation of facilities).

## 2805. COMMON SUPPORT COSTS

1. General. Common support consists of services and related goods normally supplied throughout the installation as a mission function. Commanding officers have an oversight responsibility for billeting functions. To exercise this responsibility, commanding officers must provide guidance and direction to billeting activities under their purview in the same manner as for all nonbilleting activities under their cognizance. Essential control and command supervision consists of general management functions and includes any assistance in carrying out these functions provided by the commanding officer's staff. The essential control and command supervision function is inherently the responsibility of the commanding officer. Accordingly, appropriated fund support is authorized for essential control and command supervision. NavCompt Manual, volume 7, chapter 5, provides guidance regarding appropriated fund support for billeting. Chapter 5 defines the host/tenant relationship aboard the installation in relation to appropriated fund support. Paragraph 075003.3 states that common service support functions should be included as direct program costs in the budget of the providing activity.

2. Protection of Health and Safety. NavCompt Manual, volume 7, paragraph 075500, states that all billeting activities are authorized to receive appropriated fund common support associated with

protecting the health and safety of participants, employees, resources, and property. Such services include, but are not limited to: fire protection (including acquisition and installation of extinguisher and sprinkler and alarm systems); security protection, including physical security of buildings (such as alarm systems and security bars) and protection of funds; pest control; sewage disposal; trash and garbage removal; snow removal; safety; medical veterinary and sanitary inspections; authorized veterinary care; rescue operations; and facility maintenance or repair necessary to maintain the structural integrity and external appearance of the building (includes electrical, mechanical, roofing, foundations, windows, and doors), or to correct fire and safety deficiencies.

3. Other Common Support. NavCompt Manual, volume 7, chapter 5, provides information on base common support. All billeting activities may use common support services which are normally provided by a base or installation commander and are not directly related to the health and safety of personnel or property. Such common support services typically include, but are not limited to: janitorial services, communications, legal services, and advice; and technical guidance, administration, and assistance on accounting, financial management, procurement, and civilian personnel. These common support services are funded with appropriated monies.

## 2806. NAF SUPPORT OF TRANSIENT BILLETING

1. When to Use Billeting Funds. Billeting funds may be used in place of appropriated fund support when appropriated funds are not available. The installation comptroller shall not withhold appropriated fund support due to the presence of NAF's. The NavCompt Manual considers transient billeting a supplemental mission NAFI, entitled to limited appropriated funds, aligned with category C (business) activities. Supplemental mission NAFI's are designed to provide a mechanism for collecting and using NAF's. As a practical guide, appropriated monies should be used to maintain the structure, as any other Marine Crops facility would be maintained, and provide the initial furnishings authorized for barracks.

2. Required Use of Billeting Funds for Direct Operating Costs. NavCompt Manual, volume 7, states that NAF's may be used to supplement appropriated funds and must be used for the following:

a. Costs associated with NAF employees assigned to support the activity billeting function.

b. Costs incurred related to the sale of amenities.

c. Costs related to the internal management of the billeting NAFI.

3. What to Expend Billeting Funds On. For these purposes, NAF's may be expended (when approved by proper authority) for construction and alteration of, and additions to facilities; employment and transportation of personnel; and for procurement of merchandise, supplies, equipment, and services when appropriated funds are not available for these purposes.

4. Examples of Billeting Fund Procurement Items. Examples of billeting fund procurement are:

a. Maid/housekeeping services other than in common areas.

b. Information processing systems to manage transient billeting.

c. Structural improvements that support nonappropriated services (an example would be a room to support the maid service).

d. Enhanced quality linens.

e. Enhanced/upgraded carpeting.

f. Enhanced window coverings.

g. Furnishings to include televisions, microwaves, refrigerators.

h. Room telephones.

i. Toilet articles and other supplies not readily available through appropriated supply channels.

j. Accounting and management services.

k. Staff salaries.

5. NAFI Employees. Costs related to NAFI must be paid for using NAF's. Travel of NAFI employees that is associated with appropriated programs may be charged to appropriated funds.

2807. SERVICE CHARGES. Service charges shall be established to cover the cost of maid/housekeeper, operational/management services, and amenities not available from appropriated funds. Such charges also may be used to help defray the costs of upgrading housing services and amenities used for transient personnel comparable to commercial hotel and motel accommodations.

1. Profits. The billeting fund is not in the business to generate high profits but should maintain adequate cash reserves to accomplish its mission. Sufficient revenue should be generated by

the billeting fund to provide for direct operating expenses, administrative/overhead expenses, training of NAFI employees, and acquisition/replacement of capital assets either not authorized by or not available from appropriated funds. Sufficient reserves may be generated in a 5-year financial program for major capital expenditures not authorized by or available from appropriated funds and funds for several months operating expenses if revenues are stopped for some unforeseen reason, such as rapid mobilization for war. A long-term plan on how these funds are to be used will be developed by each billeting fund.

2. Setting Room Rates. Rates are commensurate with the services provided. Charges will not be based on military rank or an individual's ability to pay. Lodging costs to the traveler should be based on the total service provided and style/type accommodation in which the traveler is residing. Family members and dependents of Marines who are casualties or in the hospital may reside in transient quarters at a rate determined by the activity commander.

a. Rates shall be reevaluated prior to the approval of the annual budget at each activity.

b. Rates shall be increased or decreased to avoid the accumulation of excess profits or operating at a loss.

c. Although specific transient quarters may not be set aside for the exclusive use of any individual or group, activity commanders may differentiate quarters as VIP, DGQ, etc., based on services and amenities provided in the quarters. Quarters designated as VIP, DGQ, etc., must maintain an occupancy rate of at least 75 percent per year. When the occupancy rate drops below 75 percent for one year the quarters will be redesignated. Transient personnel will not be denied quarters if a vacancy exists. TAD personnel are allowed to reside in transient quarters that exceed their MSA, but are not required to accept quarters below their MSA.

d. The use of NAF's for transient quarters will be distributed equitably to the types of rooms generating the funds; i.e., if the majority of funds are generated by the average room, these funds should not be used to continuously upgrade or renovate VIP or DGQ rooms. See paragraph 2509 of this Manual for maximum room charges.

3. Appraisal of Rates. The procedures for conducting an appraisal to determine lodging rates/charges and periodically adjusting charges shall be per OMB Circular A-45 (Revised) or other more current directives.

2808. ACCOUNTING SERVICES. The accounting procedures for billeting funds require that the accounting records generated in this process provide a complete and accurate history of all transactions. The billeting fund custodian is responsible for the

proper maintenance and accuracy of the accounting records. Accounting records shall be kept current at all times and made available for audit and inspection at any time. The accounting procedures contained in this chapter are applicable to all Marine Corps billeting funds. The billeting fund accounting guidelines will be in NAVSO P-3520.

1. Obtaining Accounting Services. Billeting fund accounting services are to be obtained by the activity from a source that provides the best support to the billeting fund.

a. The billeting fund custodian is not limited to any particular accounting source. Accounting services can be purchased from the activity's MWR accounting branch, commercial accounting sources in the community, or an accounting section can be set up using billeting funds within the transient billeting office.

b. Payroll processing should normally be done through MWR support.

## 2809. INVESTMENT POLICY FOR THE BILLETING FUND

1. General. The size of the investment program must not exceed the projected need to fund otherwise unfunded transient billeting requirements. Funds will not be accumulated solely for the investment income. However, when cash is being accumulated for programmed purposes (such as replacement of tangible fixed assets, employee severance pay, pension plans, construction or alteration of facilities, increasing inventories, mobilization contingencies, new operational programs that may be introduced, and to pay long-term liabilities), management action will ensure sufficient liquidity of investments while securing a competitive rate of return. A written plan will be published describing how the investment will be used to support transient billeting.

2. NAF's may be invested only as provided for in MCO 7000.19.

3. Activity commanders will establish procedures to identify and classify the purpose for which funds are invested. Programs should be based upon the premise of a "going concern," that is, capital expenditures financing should take into consideration future cash inflows and outflows in determining the amount of funds required to be available.

## 2810. DISPOSITION OF SURPLUS PROPERTY

1. NAF Property. Unless otherwise prescribed, NAF procured property may be sold, traded, or disposed of with the approval of the activity commander or their designated representative, per NAVSO P-3520.

2. Appropriated Fund. Property which was purchased with appropriated funds will be transferred to the supply department for disposal.

## 2811. INSUFFICIENT TRANSIENT QUARTERS

1. Contract Quarters. Installation commanders may contract for transient off-base commercial quarters for TAD military personnel and civilian employees if the unit cost for the quarters is less than the lodging portion of the local per diem allowance. Commercial quarters for which reduced rates have been contracted are considered Government quarters for assignment purposes.

## 2812. PERMANENT AND DESIGNATED QUARTERS

1. Permanent Party Quarters and Billeting Funds. The billeting fund may support personnel residing in permanent party quarters that contribute to the billeting fund with housekeeping services and other amenities.

2. Designated Quarters. The command may set aside specific bachelor housing facilities for the quartering of geographic bachelors. These quarters must be excess to the activity or inadequate for the housing of bona fide bachelors. A room charge shall be levied for the quarters assigned to generate billeting funds to maintain and improve these quarters. Refer to paragraph 2509.2 of this Manual for service charge guidelines. Funds generated for these type quarters should not be consolidated with other billeting funds but used for geographic bachelor quarters only.

# CHAPTER 3

## OPERATION AND MAINTENANCE OF GENERAL OFFICER QUARTERS


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# CHAPTER 3

## OPERATION AND MAINTENANCE OF GENERAL OFFICER QUARTERS

3000. BACKGROUND. Quarters assigned to general officers historically are the highest costing units in the inventory. As a consequence of these high costs and the grade of the occupants, the quarters are subject to close scrutiny. Operation and maintenance costs for each individual general officer quarters (GOQ) are reported to the Office of the Secretary of Defense annually. Local commanders now have authority to spend up to $25,000 for maintenance and repair on each GOQ per fiscal year with no cap on operations, but other restrictions remain in effect. Assignment of specific responsibilities is necessary to ensure that the supervision which the financial limitations promote is realized.

3001. POLICY. It is Marine Corps policy that GOQ's be managed as economically as practicable. In general, decisions should be made using the prudent landlord concept; that is, would a prudent landlord carry out the proposed action using that individual's own resources? This policy applies to the maintenance, repair, and improvements of the dwellings and associated grounds; and to the maintenance, repair, and replacement of all installed equipment within the quarters. It is not the intent of this or any other guidance that the GOQ's be permitted to deteriorate for the purpose of keeping operation and maintenance costs artificially low. Provision of furniture and furnishing items in GOQ's will be restricted to that necessary to supplement the occupant's personally owned furnishings in the official entertainment areas of the quarters only. Appendix B provides detailed guidance concerning the policy on furnishings.

3002. DESIGNATION OF GENERAL OFFICER QUARTERS

1. Authority. The CMC retains the authority for the designation of specific quarters for general officers.

2. Designation of Quarters. GOQ's reported on the installation's real property inventory are not to be redesignated without prior approval from the CMC. Prior approval is also required from the CMC for any additional GOQ's required at an installation. These requests must contain the effective date, quarters ID, anticipated occupant, (if known), projected budget requirements for budget year plus 3 years, and the associated Long Range Maintenance Plan.

3. Use of Nondesignated Quarters. The family housing officer will inform the CMC when general officers having no specific billet designation occupy family quarters.

3003. FURNISHINGS. Supplementary furnishings for the official entertainment areas are authorized,

1. Repair/Replacement. Furnishings are to be repaired/replaced on an "as required" basis using the prudent landlord concept.

2. Authorized Furnishings

a. Carpet and Drapes. Draperies and sheer curtains may be provided for the official entertainment areas of the quarters. Additionally, they may be provided for reasonable window treatment through all areas of the quarters designated as special command positions. Procurement of carpet and draperies should be a "neutral" shade to ensure compatibility with any occupant’s furnishings (present and future). Where replacement is required in less than 7 years and/or where costs are in excess of $30 per yard for draperies or $30 per square yard for carpeting (installed), justification must be provided.

b. Furniture. Procurement and repair is limited to supplementary furniture for the official entertainment areas only. It is not intended to replace personal furnishings.

c. Other Furnishings. The following equipment is authorized: Cooking stove, refrigerator, food freezer, installed dishwasher, microwave oven, trash compactor, garbage disposal, and clothes washer, and dryer.

# CHAPTER 3

## OPERATION AND MAINTENANCE OF GENERAL OFFICER QUARTERS

### SECTION l: RESPONSIBILITIES

3100. OCCUPANT RESPONSIBILITIES. The occupant of each GOQ is responsible for the following:

1. Being aware of all costs for the quarters and personally reviewing, atleast semiannually, the operation and maintenance costs for the quarters.

2. Authorizing only actions which are consistent with reasonable economic measures contained in this Manual, and any subsequent guidance which may be directed by higher authority concerning GOQ's.

3. Personally approving all proposed work on the quarters. Occupant approval shall be obtained prior to the initiation of any such work, except for emergency repairs.

4. Approving and signing all requests for funding, except those routine costs over which the occupant has no influence (such as utility rate increases, wage increases, pro-rata share of major repair projects). Additionally, the occupant must approve and sign each request for authorization to perform work on the quarters which requires approval by the CMC (LF). If the quarters are vacant, the request must be approved and signed by the CG of the installation.

5. Conserving utilities, including the prudent use of heating and cooling in rooms not used for family living.

6. Reviewing, for possible reductions and cost savings, the type, scope, frequency of service, and grounds maintenance provided.

7. Ensuring that no work is performed solely for reasons of personal taste or compatibility with personal furnishings or decorating preference.

8. Ensuring that the work done, other than emergency maintenance or repair, is scheduled during normal working hours whenever possible.

9. Ensuring compliance with CMC Green Letter 3-88.

3101. COMMAND RESPONSIBILITIES. The local commander is responsible for the following:

l. Providing each occupant of a GOQ under their management control with a midyear and annual report of the operation, maintenance and improvement costs of the quarters.

2. Reviewing scope, frequency, and cost of all work to provide recommendations for economy to the occupants. Accordingly, all nonemergency maintenance and work should be scheduled during regular working hours whenever possible.

3. Ensuring that the occupant has given approval of proposed work or expenditures prior to initiation of a request to higher authority.

4. Ensuring that the annual family housing operation and maintenance budget identifies all requirements, both recurring and nonrecurring, and provides a realistic estimate of the annual costs for each GOQ for the budget year and out years. This should include the estimated costs associated with any anticipated change of occupants. Additionally, the quarters shall be examined not less than annually for the purpose of ascertaining all nonrecurring expenses (such as carpet and/or drapery replacement, furniture repair, minor structural repairs, etc.) being programmed for accomplishment in the budget year or out years. Include these nonrecurring items in the annual family housing budget estimates.

5. Ensuring the operations and maintenance expenditures are by command maintenance plans, Congressional limitations, and any CMC limitations/policy. Improvement and/or major repair projects which will cause maintenance and repair expenditures to exceed the Congressional limitation, $25,000 must be approved through the budget process. Ensure that requests of this nature are submitted to the CMC (LFF) well in advance for proper submittal in the budget process. Figure 3-1 is provided to assist in determining funding approval authority.

6. Accomplishing only that work consistent with the prudent landlord concept and economic measures outlined in this Manual and any references.

7. Ensuring that the General and Flag Officer Quarters Management Report (DD Form 2405) (figure 3-2) is submitted to the CMC (LFF) by 30 October of each year. (See paragraph 3202.)

8. Ensuring that the spirit and intent of the Marine Corps policies governing the operation and maintenance of the GOQ’s are met.

3102. HQMC RESPONSIBILITIES. The CMC (LFF) is responsible for the following:

1. Reviewing installation GOQ budget submittals and monitoring all proposed and approved major repair and improvement projects through execution.

2. Ensuring that the established financial limitation for maintenance and repair is per Congressional limitations.

3. Ensuring that the spirit and intent of both higher authority and Marine Corps policies governing the operation and maintenance of GOQ’s are met.

3103. OVERALL RESPONSIBILITY. All personnel involved with the management of GOQ's must be cognizant of spending limitations and notification requirements. This stringent criteria requires detailed long range planning for maintenance, repair, and improvement projects. Major projects must be accurately estimated, approved through the budget process and executed during the intended fiscal year. This requires close coordination between the occupant, housing manager, and comptroller.

| CATEGORY | COST LIMIT | AUTHORITY | REMARKS |
|---|---|---|---|
| Annual budget request | Under $25,000 for maintenance and repair | HQMC/Local Cmdr 1/ | |
| | $25,000 & Over for Maintenance and Repair | HQMC/SECNAV | Requires prior Congressional notification through the budget process 3/ |
| Increases to annual budget previously reported to Congress | $5,000 or 25% of approved amount which-ever is less | HQMC | |
| (applies to maintenance and repair to include major repair & improvement projects only). | $5,000 & Over | HQMC/SECNAV | Requires Congressional notification prior to execution |
| Improvement 2/,3/ | $2,000-$40,000 4/ (not incidental) | HQMC/SECNAV | Requires Congressional notification if project causes total maintenance and repair costs to exceed $25,000 |
| | Over $40,000 4/ | Congress | Only through budget process as line item approval |
| Incidental Improvements | Under $2,000 | Local Cmdr | Total ceiling amount cannot exceed $25,000 for maintenance and repair without prior approval of HQMC |

NOTES:

1/ Local Commander - Commanding Officer of the installation holding the property account for the GOQ.

2/ Incidental improvements, projects under $2,000, use O&M funds. Improvements on projects over $2,000 (not incidental) use construction funds.

3/ GOQ's exceeding the $25,000 Congressional limitation for maintenance and repair need to fully justify the proposed major repair/improvement project and any other associated costs.

4/ Amount of improvements that can be approved are dependent upon area cost factors and previously approved Congressional limitation on quarters.

Figure 3-1.--General Officer Quarters (GOQ) Expenses Approval Authorities.

# CHAPTER 3

# OPERATION AND MAINTENANCE OF GENERAL OFFICER QUARTERS

## SECTION 2: LIMITATIONS AND REQUIREMENTS

### 3200. LIMITATIONS

1. Congressional Limitation. Congress allows up to $25,000 for maintenance and repair with no cap on operations per GOQ per fiscal year. Maintenance and repair costs exceeding this limitation must be specifically identified to Congress with the annual budget justification material. Out-of-cycle requests are strongly discouraged, as well as any out-of-cycle work except in the case of an emergency or safety related situation. This policy was established in FY 1988.

Once identified to Congress through the budget process, all costs (to include operations and utilities) then become "fixed" costs. These costs cannot be exceeded without prior approval from either the CMC or Congress.

2. CMC Limitation. The CMC allows up to $20,000 for maintenance and repair with no cap on operations per GOQ per fiscal year. The CMC retains the $5,000 additional limitation as a hedge against overspending. Any anticipated expenditure between $20,000 and $25,000 must be approved by the CMC. This policy began in FY 1990.

3201. BUDGET REQUIREMENTS. Limitations are based upon budget exhibits and Long Range Maintenance Plans (LRMP) submitted to the CMC as part of the annual Family Housing Budget. These exhibits and plans are used as planning tools for notification to Congress through the budget process. The Family Housing Budget submission is prepared 2 years in advance of the execution year.

1. The budget exhibits must contain the budget year plus the out years as requested by the CMC as part of the annual Family Housing Budget submit. It should provide a realistic estimate of the costs and coincide with the LRMP.

2. The LRMP identifies the budget year plus 5 years. The LRMP should also provide realistic estimates of the costs associated with the quarters. Include any major repair/improvement projects that may be required in the budget and out years. This information is necessary for notification to Congress through the budget process. The preferred LRMP is provided at figure 3-3.

Ensure that any projected costs for maintenance and repair projects are budgeted within the overall Family Housing Budget Submit and identified on the applicable exhibits.

3. All exhibits and plans must bear the signature of the occupant or the commanding general of the activity if the quarters are vacant.

4. The budget exhibit and LRMP requires close coordination between the occupant, housing manager, and comptroller.

3202. REPORTING REQUIREMENTS. Each activity is required to submit to the CMC (LFF) by 30 October of each year the General and Flag Officers Management Report. Marine Corps Report Control Symbol DD-11103-02 (external RCS DD-P&L(A)1706) has assigned to this report. Refer to figure 3-2.

1. This report should reflect the actual operations, maintenance and repair, and improvement obligations for the fiscal year.

2. A separate form is required for each GOQ under your management control.

3. Coordination should be made with the installation comptroller prior to submission to HQMC.

4. Instructions are provided in appendix O.

| GENERAL AND FLAG OFFICER QUARTERS MANAGEMENT REPORT | | REPORT CONTROL SYMBOL DD-A&L(A)1706 |
|---|---|---|
| 1. REPORT DATE | 2. REAL PROPERTY INVENTORY CODE (RPIC) | |
| 3. INSTALLATION DATA | | |
| a. NAME | b. MAJOR COMMAND / ENGINEERING FIELD DIVISION | |
| c. STATE | d. ZIP CODE | e. COUNTRY |
| 4. QUARTERS DATA | | |
| a. QUARTERS IDENTIFICATION CODE (QIC) | b. LOCAL QUARTERS IDENTIFICATION | |
| c. NET FLOOR AREA (Sq Ft.) | d. YEAR BUILT | |

| 5. MANAGEMENT DATA *(Enter whole dollar amounts only)* | | |
|---|---|---|
| a. OPERATIONS | $ | |
| b. LEASE | $ | |
| c. MAINTENANCE AND REPAIR | $ | |
| d. TOTAL OPERATION AND MAINTENANCE (5a. + b. + c.) | | $ |
| e. CONGRESSIONALLY APPROVED AMOUNT FOR O & M | | $ |
| f. IMPROVEMENTS | $ | |

DD Form 2405, OCT 85

Figure 3-2.--General and Flag Officer Quarters Management Report - (DD Form 2405).

| | | | |
|---|---|---|---|
| Quarters No.: | Single Story: | Net Sq Ft: | |
| No. of Bdrms: | Two Story: | Gross Sq Ft: | |
| No. of Baths: | Three Story: | Year Constructed: | |

| DESCRIPTION | LAST REPLACED | LIFE EXPECTANCY | BUDGET YEAR(BY) | BY+1 | BY+2 | BY+3 | BY+4 | BY+5 |
|---|---|---|---|---|---|---|---|---|
| Routine MANAGEMENT Estimate | | | | | | | | |
| Routine SERVICES Estimate | | | | | | | | |
| Routine FURNISHINGS Estimate | | | | | | | | |
| Refrigerator | | 15 yrs | | | | | | |
| Free Standing Range | | 10 yrs | | | | | | |
| Range Top | | 10 yrs | | | | | | |
| Range Hoods | | 15 yrs | | | | | | |
| Wall Oven | | 10 yrs | | | | | | |
| Carpeting (Specify Rooms) Cleaning Replacement | 7 yrs | | | | | | | |
| Drapes/Shades (Specify Rooms) Cleaning Replacement | | 7 yrs | | | | | | |
| Entertainment Furnishings (Specify Items) | | | | | | | | |
| Routine UTILITIES Estimate | | | | | | | | |
| SUBTOTAL OPERATIONS: (INCLUDES MGMT + FURNISHINGS + SERVICES + UTILITIES) | | | $0 | $0 | $0 | $0 | $0 | $0 |
| Routine RECURRING MAINTENANCE Estimate | | | | | | | | |
| MAINTENANCE & REPAIR Estimate | | | | | | | | |
| Dishwasher | | 4 yrs | | | | | | |
| Garbage Disposal | | 5 yrs | | | | | | |
| Hot Water Heater | | 5 yrs | | | | | | |

Figure 3-3.--General Officer Quarters Long Range Maintenance Plan.

| DESCRIPTION | LAST REPLACED | LIFE EXPECTANCY | BUDGET YEAR(BY) | BY+1 | BY+2 | BY+3 | BY+4 | BY+5 |
|---|---|---|---|---|---|---|---|---|
| A/C Compressor/ Condenser (Specify Rplmt or Rprs) | | 10 yrs | | | | | | |
| Heating Unit/Heat Pump | | 15 yrs | | | | | | |
| Plumbing Fixtures: Kitchen Bath | | 15 yrs | | | | | | |
| Cabinets/Countertops: Kitchen Bath | | 15 yrs | | | | | | |
| Floor Tile: Kitchen Bath | | 10 yrs | | | | | | |
| Interior Electrical Distribution System | | Indef | | | | | | |
| Interior Plumbing Distribution System | | Indef | | | | | | |
| Roof Replacement | | 12 yrs | | | | | | |
| Exterior Siding Cleaning Replacement | | 12 yrs | | | | | | |
| Paint: Exterior/Caulking Exterior Door/Trim Interior (Walls) Interior (Doors/Trim) | | 4 yrs | | | | | | |
| Doors: | | | | | | | | |
| Exterior | | 12 yrs | | | | | | |
| Screen/Storm Doors | | Indef | | | | | | |
| Garage | | 12 yrs | | | | | | |
| Driveway/Street | | | | | | | | |
| Resurface | | 10 yrs | | | | | | |
| Sealcoat | | 10 yrs | | | | | | |
| Clothesline | | 5 yrs | | | | | | |

Figure 3-3.--General Officer Quarters Long Range Maintenance Plan--Continued.

| DESCRIPTION | LAST REPLACED | LIFE EXPECTANCY | BUDGET YEAR(BY) | BY+1 | BY+2 | BY+3 | BY+4 | BY+5 |
|---|---|---|---|---|---|---|---|---|
| Fences - Stain/Repair | | 4 yrs | | | | | | |
| Grounds Care | N/A | Recurring | | | | | | |
| Change of Occupancy (Specify work if not stated above) | | 3 yrs | | | | | | |
| MINOR REPAIR/REPLACEMENT Estimate | | | | | | | | |
| MAJOR REPAIR/IMPROVEMENT PROJECTS: | | | | | | | | |
| Project #: | | | | | | | | |
| Project #: | | | | | | | | |
| SUBTOTAL MAINT & RPR ITEMS: (INCLUDES RECURRING + M&R + MINOR M&R + MAJOR RPR & IMPR) | | | $0 | $0 | $0 | $0 | $0 | $0 |
| TOTAL PROJECTED COSTS: (INCLUDES OPERATIONS + MAINT & RPR) | | | $0 | $0 | $0 | $0 | $0 | $0 |

NOTES:

1. Budget Year (BY) should be annotated with ACTUAL COSTS for items being repair/replaced.
2. BY+1 through BY+5 should be annotated with "REASONABLE ESTIMATES" for the planned year of execution.
3. "INSPECT" should be annotated ONE YEAR before REPLACEMENT of item.
4. If items DO NOT APPLY to your GOQ, please DELETE. Only list items that are applicable to your quarters.
5. The TOTAL PROJECTED COSTS should match with the 10536 budget exhibit for each GOQ.
6. This LRMP is a PLANNING TOOL and should be used as such.

Figure 3-3.--General Officer Quarters Long Range Maintenance Plan--Continued.

# CHAPTER 3

# OPERATION AND MAINTENANCE OF GENERAL OFFICER QUARTERS

## SECTION 3: SPECIAL COMMAND POSITIONS

3300. DEFINITION. A position in which the incumbent is required to represent the interest of the United States in an official and social entertainment activity(ies) involving foreign and/or United States dignitaries of high governmental and military grade and/or outstanding members of the business, industrial, labor, scientific, and academic communities.

3301. DESIGNATION. Designation of subject quarters requires the approval by the Secretary of the Navy.

3302. SPECIAL COMMAND POSITIONS: There are three Special Command positions within the Marine Corps. They are:

| | | |
|---|---|---|
| Quarters 6 | CMC House | Marine Barracks, 8th & I, Washington, DC |
| Quarters 2 | ACMC House | Marine Barracks, 8th & I, Washington, DC |
| Quarters 1 | CG House | Marine Corps Combat Development Command, Quantico, Virginia |

1. Furnishings. The official entertainment areas (entrance foyer, living room(s), dining room, guest bedroom(s), stairways and hallways interconnecting these areas only) may be supplemented with furnishings.

2. Special Allowance. A special allowance for table linens, china, glassware, silver, and kitchen utensils is authorized.

a. The maximum authorized for the purchase of such items is $3,500 for an original outfitting and $400 for maintenance and repair, and replacement within any one fiscal year per set.

b. Funds for maintenance of special allowance items and/or furnishings will be included within the installations budget estimate. Identify these items separately.

c. Procured items shall not contain an identification of a specific service. This will provide for use by members of all DoD components.

# APPENDIX A

## DEFINITIONS

1. Abuse. Deliberate unauthorized use of Government property or willful misconduct.

2. Adequate Family Housing. Public quarters for which full housing allowances are withheld when assigned.

3. Appraisal. Involves direct comparison of Government-furnished rental housing with individual private rental housing units.

4. Bachelor Housing. Barracks provided for the use of eligible personnel.

5. Community Housing. Private housing in the vicinity of the installation.

6. CONUS. The 48 contiguous states and the District of Columbia.

7. Conversion. Permanent change in use of Government facilities that will change category code on real property inventory or to combine Government quarters.

8. Dependent. The sponsor's:

a. Spouse.

b. Unmarried child who is the sponsor's by birth, legal adoption, or marriage (e.g., stepchild) who is under 21 years of age and is dependent on the sponsor, incapable of self-support because of a mental or physical incapacity and dependent on the sponsor for over one-half of his or her support, or is under 23 years of age, enrolled in a full-time course of study at an approved institution of higher learning, and dependent on the sponsor.

c. Adult relative by blood, marriage (e.g., parent-in-law or stepparent), or adoption who is dependent on the sponsor for over one-half of his or her support and eligible for a dependent I.D. card.

9. Discrimination. An act, policy, or procedure that arbitrarily denies an individual or group equal treatment in housing because of race, color, creed, national origin, gender, or mental or physical disabilities.

10. Diversion. Temporary use of Government facilities for other than designated use. Does not change category code on real property inventory.

11. Family Housing. Public and substandard quarters provided for the families of Marine Corps personnel instead of the payment of housing allowances or on a rental or occupancy basis.

12. Housing. Family and bachelor housing that the Marine Corps owns, leases, obtains by permit, or otherwise acquires for use by its personnel.

13. DoD personnel. Includes both military and DoD civilian personnel.

14. DoD-Sponsored Civilian Personnel. Civilians who are not DoD-appropriated or nonappropriated fund employees but are key and essential to mission accomplishment and are located at the installation as a result of direct or indirect sponsorship by a DoD Component (e.g., Red Cross personnel, contract technicians, bank managers, and others as determined by the installation commander).

15. Domestic Leasing. Leased military family housing in the 50 states, District of Columbia, Puerto Rico, and Guam.

16. Essential Personnel. Military and civilian personnel required by the installation commander to reside on the installation because of military necessity and operational considerations.

17. Excellence. Continual improvement in quality.

18. Foreign. All areas outside the United States.

19. Furnishings. Furniture, household equipment, carpet (when not installed as part of the unit), draperies, and miscellaneous items procured under special authority. Includes special allowance household goods such as china, glassware, silver, table linen, cutlery and kitchen utensils (excluding small powered appliances). In foreign areas, includes equipment or appliances normally provided as part of the housing unit in the United States, such as moveable kitchen cabinets, wardrobes, or light fixtures.

20. Geographic Bachelor. A person with dependents, but who has chosen not to be accompanied by the dependents.

21. Government Quarters. Family and unaccompanied personnel housing units that the DoD owns, leases, obtains by permit, or otherwise acquires.

22. Gross Negligence. An extreme departure from the course of action to be expected of a reasonably prudent person, all circumstances being considered, and accompanied by a reckless, deliberate, or wanton disregard for the foreseeable consequences of the act.

23. Improvement. Alterations, additions, expansions, and extensions including rehabilitation of a housing unit.

24. Inactive Housing. DoD housing units which have been placed in a caretaker status and are not available for occupancy for reasons other than routine maintenance and cleanup.

25. Installation Commander (for the Purpose of Providing Furnishings). The commanding officer (grade 06 and above) of an installation having responsibility for that installation. The commander of a mobile or military unit or installation who does not otherwise have responsibility for land, buildings, and fixed improvements is not an installation commander. Commanding officers of tenant installations within the geographic jurisdiction of a military installation are not considered installation commanders for the purpose of the provision of furnishings.

26. Involuntarily Separated Personnel

a. Family Housing. Service member who elected to be unaccompanied by dependents because of the lack of acceptable housing at the permanent duty location.

b. Bachelor Housing. Unaccompanied service member with dependent(s) (including single person who has custody of dependents) who is assigned to a foreign location, or for whom family housing is not programmable regardless of desire to be accompanied.

27. Leased Quarters. Public quarters under control of the Department of Defense obtained by a Government lease agreement.

28. Maintenance. The recurrent, day-to-day, periodic, or scheduled work required to preserve or restore a real property facility to such condition that it may be effectively used for its designated purpose. Includes work undertaken to prevent deterioration or damage to a facility without which the facility would be more costly to restore.

29. Minority. Any person who is or may become subject to discrimination because of race, color, religion, gender, or national origin.

30. National Register of Historic Places. The listing of districts, sites, buildings, structures, and objects of national, state, or local significance in American history, architecture, archeology, and culture that is maintained by the Secretary of the Interior.

31. Negligence. The failure to act as a reasonably prudent person would have acted under similar circumstances.

32. Private Housing. Quarters not provided by the DoD Components.

33. Public Entertainment Area. That area in a set of quarters intended to accommodate public rather than private entertainment. Includes the entrance foyer, living room(s), dining room, and the stairways and hallways interconnecting these areas. Enclosed porches, dens, libraries, family rooms, upstairs hallways (unless there is no bathroom available for guests to use on the first floor), and other areas of the quarters normally are not considered as part of the public entertainment area. Guest bedrooms in quarters of Special Command Positions may be included if overnight accommodation of official visitors is required.

34. Public Quarters. Adequate housing accommodations provided by the Government.

35. Quarters. All living accommodations.

36. Reasonable Value. Reasonable value for rental quarters is to be measured by the test of equivalence (i.e., what the employee would pay for comparable housing in the open market). Rental rates, including charges for related facilities, when appropriate, shall be based upon prevailing rates for comparable private housing located in the same general area, after taking into account those factors that reduce or increase the value of the housing to the tenant.

37. Related Facilities (for Rental Quarters). Equipment, supplies, and services made available in connection with the occupancy of quarters including, but not limited to, household furniture and equipment, garage space, utilities, subsistence, and trash and laundry services.

38. Rental Quarters. Except as specifically excluded here or by statute, the term rental quarters includes all furnished and unfurnished quarters supplied under specific Government authority to Government employees, contractors, contractor employees, and all other persons to whom housing is provided as an incidental service in support of Government programs. It includes, but is not limited to, Government-owned or -controlled single family dwellings, apartments, bunkhouses, dormitories, trailer pads, cabins, guard stations and lookouts, mobile homes, house trailers, permanent and semipermanent tents, and housekeeping and nonhousekeeping units. It also includes housing facilities designated as substandard family housing quarters.

39. Repair. The restoration of a real property facility to such condition that it may be effectively utilized for its designated purposes, by overhaul, reprocessing or replacement of constituent parts or materials that have deteriorated by action of the elements or wear and tear in use.

40. Restrictive Sanction List. Actions taken by the installation commander to preclude military personnel from entering into a rental, lease, or purchase arrangement with, or occupying housing of, an agent who has been found to have discriminated against military personnel or their dependents.

41. Sample Method Survey (SAMS). A method of surveying current housing conditions based on random sampling within personnel categories.

42. Special Command Position. A position designated by the Assistant Secretary of Defense (Comptroller) (ASD/C) if incumbent is a general or flag officer, or civilian of equivalent rank, and if the public relations responsibilities require the incumbent to represent the interests of the United States in official entertainment involving foreign or U.S. dignitaries of high governmental or military rank, and outstanding members of the business, industrial, labor, scientific, and academic communities. These positions are identified in DoD Instruction 1100.12.

43. Special Command Position Housing. DoD family housing specifically designated for occupancy by incumbents of a special command position.

44. Substandard Family Housing. DoD-controlled housing, specifically authorized by the Congress, that is not adequate and is occupied subject to a charge against a service member's BAQ for the fair market value of the quarters not to exceed 75 percent of the BAQ amount.

45. Supplemental Furnishings. Furnishings provided in the entertainment areas of family housing to supplement personally owned furnishings of occupants who are required to accommodate or entertain visitors frequently as part of their official duties.

46. Unaccompanied Personnel. Personnel who either have no dependents or who are geographically separated from all dependents.

47. Uniformed Services. Refers to the Army, Navy, Air Force, Marine Corps, Coast Guard, Commissioned Corps of the U.S. Public Health Services, and the Commissioned Corps of the National Oceanic and Atmospheric Administration.

48. United States. The 50 states, the District of Columbia, and U.S. possessions and territories.

49. United States Armed Forces. All components of the Army, Navy, Air Force, Marine Corps, and Coast Guard.

50. United States Overseas. Alaska, Hawaii, and U.S. possessions and territories.

51. U.S. Possessions and Territories. Outlying areas of the United States, including Puerto Rico, Virgin Islands, Trust Territory of the Pacific Islands, American Samoa, Wake and Midway Islands, and Guam.

52. Voluntarily Separated Person

a. Family Housing. Service member who, for reasons other than availability of housing at the permanent duty location, elected not to be accompanied by dependents.

b. Bachelor Housing. Service member in CONUS, Hawaii, or Alaska, for whom family housing would otherwise be programmable, who elected for any reason not to be accompanied.

53. Willful Misconduct. Intentional damage, destruction, or loss of Government property.

54. Worldwide. CONUS, U.S. overseas, and foreign combined.

FAMILY HOUSING FURNISHINGS, FURNITURE AND EQUIPMENT

1. Text Reference. See paragraphs 1106, 1601.3b, 3001, and 3302.1.

2. Definitions. The following definitions are applicable to family housing furnishing management.

a. Furnishings. Furnishings include furniture, household equipment, and miscellaneous items necessary to provide a reasonable degree of livability as specified herein. It does not include household goods, such as linens, cutlery, silverware, dishes, and kitchen utensils, except as authorized herein. It does include movable equipment, such as cooking stoves, refrigerators, clothes dryers, clothes washers, and freezers. Garbage disposals and permanently installed dishwashers are not considered to be furnishings but are a part of the housing unit. When a distinction between furniture and movable equipment is required, the following shall apply:

(1) Furniture. Items such as beds, dressers, chests, tables, chairs, etc. The term also includes such items as lamps, mirrors, rugs, draperies, and slipcovers.

(2) Equipment. Includes all household movable equipment, such as clothes washers and dryers, ranges, refrigerators, freezers, and portable dishwashers.

b. Government Quarters. Housing units which the Government owns, leases, or otherwise serves as landlord.

c. Rental Quarters (Inadequate Government Quarters). Housing units which have been determined to be inadequate and for which the Government charges rent to the occupant. Rent from military personnel eligible for BAQ is paid by withholding an appropriate portion of BAQ.

d. Private Quarters (Non-Government Quarters). Living accommodations obtained by military or civilian personnel from the private sector of the economy by lease, rent, purchase, or other means, to include rental guarantee housing sponsored by the Government.

e. CONUS. The 48 conterminous states and the District of Columbia.

f. U.S. Overseas. Alaska, Hawaii, and U.S. possessions.

g. Foreign. All other, excluding CONUS and the U.S. overseas.

h. Special Command Positions. A position in which the incumbent is required to represent the interests of the United States in official and social entertainment activities involving foreign and/or United States dignitaries of high governmental and military grade or outstanding members of the business,

industrial, labor, scientifiC, and academic communities. Designation of special command positions requires approval of the Secretary of the Navy.

i. Installation Commander. The term "installation commander" refers to the commanding officer of a Marine Corps activity (base, camp, or station).

3. Policies. Under normal conditions, only ranges and refrigerators will be provided for Government quarters within CONUS. Outside CONUS other furnishing may be provided if it is determined to be advantageous to the Government. The following guidance applies:

a. Within CONUS

(1) Government Family Quarters

(a) Ranges and refrigerators will be provided to all Government family housing quarters.

(b) Government furnishing may be provided for the official entertainment areas of general officer quarters and installation commanders.

(2) Private Quarters. Government furnishings are not authorized for use in private quarters.

b. Outside CONUS

(1) Government Family Quarters. Furnishings, including cooking stoves and refrigerators, may be provided if it has been determined by economic analysis that it is more advantageous to the Government to provide Government furnishings in lieu of personally owned furnishings. In making this determination, consideration will be given to overall economy, equity, and personal preference of eligible military personnel and civilian employees. A uniform policy will be applied for each area outside CONUS, to be applicable regardless of a member’s military service affiliation.

(2) Private Quarters. Government furnishings may be provided in private quarters occupied by military or civilian personnel upon a determination that it is more advantageous to the Government to provide furnishings in lieu of shipping personally owned furnishings.

(3) Temporary Loan of Furnishings. Government furnishings (only those essential items necessary for a reasonable degree of livability) may be provided on a temporary loan basis for short periods of time pending receipt of intransit personally-owned furnishings when determined advantageous to the Government.

(4) Weight Restrictions. Where Government-owned furnishings are provided in quarters outside CONUS, an appropriate reduction in the individual’s authorized shipping allowance for transportation of personally owned furnishings will be applied.

Q

c. Quarters Used for Special Command Positions

(1) Entertainment areas (living room, dining room, etc.) of quarters occupied by personnel assigned to special command positions, as described by SECNAVINST 11101.68, may be furnished if a requirement exists to accommodate official visitors overnight. A special allowance for table linen, china, glassware, silver, and kitchen utensils is also authorized for the express use of incumbents of these positions.

(2) The maximum authorized for the purchase of items included within these special allowances is $3,500 for an original outfitting, and $400 for maintenance repair and replacement within any one fiscal year per set of quarters. The Commandant of the Marine Corps will budget for the initial outfitting, based on input provided by the applicable installation. Funds for maintenance of special allowance and/or furnishings will be included within the installation's budget estimate and be separately identified.

d. General Officers and Installation Commanders' Quarters. Furnishings may be provided in family quarters occupied by an installation commander with the grade of colonel and all general officers quarters in that these officers are required to accommodate or entertain visitors frequently as part of their official duties. Government-owned furnishings will be restricted to the entertainment areas (living room, dining room, etc.) and will in no way replace personally owned furnishing normally expected in relation to grade and family size. Furnishings requests will be submitted per the instructions contained in current regulations.

e. Entitlements

(1) DOD personnel have no specific legal entitlement to Government-owned furnishings. The provision of table linens, dishes, glassware, silver, and kitchen utensils in family quarters is prohibited by 10 U.S.C. 2387 except for quarters occupied by incumbents of special command positions. Government-owned furnishings are authorized when it is considered to be in the best interests of the Government.

f. Authorized Government-Owned Equipment

(1) Cooking Range and Refrigerator

(a) These items will be provided for all Government housekeeping quarters. Occupants shall not be authorized to replace Government-owned cooking stoves and refrigerators with personally owned items without specific approval of the installation commander. Personally owned items may be stored at Government expense.

(b) A cooking stove and refrigerator may be provided within private quarters outside CONUS when they are not furnished by the landlord as a part of the quarters, or there is a current restriction on the shipment of like personally owned items. They may also be provided when personally owned equipment is not readily adaptable for use at the location where it is required.

(c) When occupants choose to use their privately owned refrigerators or ranges, they are to notify the housing office and request pick-up of the Government unit.

(2) Low-Temperature Food Storage Cabinets (Freezers). The provision or replacement of freezers in housekeeping quarters shall be subject to prior approval of the CMC. Freezers are authorized for use only within the following:

(a) For use in quarters which have been designated as special command positions. (See paragraph 3302.)

(b) For use in quarters of occupants having official entertainment duties and responsibilities of sufficient size and frequency to require a freezer. (See paragraph 3003.2c.)

(3) Dishwashing Machines. Automatic dishwashers are authorized to be permanently installed in housekeeping quarters. The kitchens of all new family housing units include dishwashers. The initial installation of dishwashers in existing housing is an improvement and should be installed in conjunction with kitchen modernization improvement projects. When dishwashers can be provided within available funds, procurement will be through the GSA and conform to the most recent Federal specification. Installed dishwashers are considered to be a structural component and are to be maintained and replaced in the same manner as hot water tanks, garbage disposals, etc.

(4) Clothes Washers and Dryers. The provision of clothes washers and dryers is authorized for Government quarters and private housekeeping quarters outside CONUS, providing the quarters are located in a weight restricted area. The provision of clothes washers and dryers is not authorized within CONUS housekeeping quarters, except for designated special command position quarters and quarters occupied by foreign personnel.

g. Shipment Outside CONUS. Where Government-owned equipment is provided outside CONUS, the shipment of similar personally owned items of household equipment is not authorized.

4. General Information

a. Determining Requirements. Determination of types and quantities of items to procure and/or maintain on hand requires careful planning to minimize shortages and excesses. Installation commanders shall maintain a tabulation of kinds and quantities of items provided by the Government to develop and maintain experience tables to be used in determining and adjusting inventories to meet requirements.

b. Replacement

(1) Installations should minimize the amount of equipment, by item, kept in the family housing inventory. However, there should be sufficient quantities in stock to provide for normal repair and replacement requirements.

(2) Whether an item is replaced or repaired is a local decision. However, the anticipated useful life and cost to repair versus replace should be factored into the analysis.

(3) All equipment purchased should be those authorized under GSA regulations and shall comply with the Marine Corps goal of energy reduction.

c. Identification Marking

(1) Furniture. Quarters furniture is specifically excluded from the identification system prescribed for class 3 plant property by the NavCompt Manual, volume 3, chapter 6. However, it is essential that such items be marked to identify that they are Government property. Accordingly, it is recommended that individual items of furniture be marked "USMC" prior to issuance to occupants of quarters. Markings shall be in an inconspicuous place so as not to detract from the appearance of the item.

(2) Equipment. All movable equipment shall be identified as Government property and numbered serially to provide positive, continuing identification by use of stencils, metal tags, or other means not susceptible to easy removal. Consecutive numbers shall be assigned, and the same number will not be reassigned when an item is surveyed. Marking shall be in a place of the equipment which will not detract from the appearance of the item.

d. Unauthorized Work. No articles of furniture may be manufactured at a Marine Corps installation except on authority of the CMC.

# APPENDIX C

## INSTRUCTIONS FOR COMPLETING THE FAMILY HOUSING INVENTORY AND OCCUPANCY REPORT (DD FORM 1410)

1. Text Reference. See paragraphs 1202.2d and 1516.11.

2. Purpose

a. These instructions provide the user procedural guidance in the preparation and submission of the annual Family Housing Inventory and Occupancy Report.

b. This is a continuous report in that a maintenance work sheet is provided by FACSO which contains permanent type information as it was submitted on the last report. It is prepared annually as of 30 September.

c. When the report is received, check to make sure that you have been sent the correct worksheets for your activity. Contact your @EFD if you have not and they can provide you with another copy of the maintenance report.

d. Procedural guidance and instructions concerning the preparation and submission of the inventory and occupancy work-sheets is presented in this section.

3. Procedures. All family housing in the Department of the Navy Real Property Inventory shall be reported, including units on loan to the Army, Air Force, and other services. Housing units borrowed from other services will not be reported. The following are procedures to be followed in reporting family housing.

a. FACSO will forward a copy of the Family Housing Inventory and Occupancy Report (DD Form 1410) figure C-1 (Marine Corps Report Control Symbol DD-1ll0l-26 (External RCS DD-P&L(A)1081)), and Family Housing Inventory Designation and Assignment Report (DD Form 1411) figure C-2 (Marine Corps Report Control Symbol DD-1110l-27 (External RCS DD-P&L(A)l082)) directly to each reporting activity (with a copy to the EFD and CMC by 15 October annually). The installation will update the worksheets per these instructions and forward to the cognizant EFD within 10 working days after 30 September. EFD submission and correction should be completed within 30 working days after the end of the report period.

b. The report for Marine Corps activities will be processed at the supporting EFD. Therefore, Marine Corps activities will forward the worksheets to the EFD with a copy to the CMC.

c. Where gains, losses, or other actions affecting records occur during a reporting period, including leased units, it is important that the information be coordinated at the installation level with the office which is responsible for maintaining the official real property inventory. Reports showing new additions, disposals, inactivations, reactivations, conversions, and diversions must be accompanied by an additional sheet citing the approval authority.

## FAMILY HOUSING INVENTORY AND OCCUPANCY REPORT

1. REPORT PERIOD (YYMMDD)

REPORT CONTROL SYMBOL DD-A&L(A)1081

2. INSTALLATION NAME

3. MAJOR COMMAND/EFD

4. AREA
- a. CONUS
- b. US OVERSEAS
- c. FOREIGN
- d. WORLDWIDE

5. TYPE OF REPORT
- a. INDIVIDUAL
- b. SUMMARY

6. INSTALLATION STATUS
- a. ACTIVE
- b. INACTIVE
- c. EXCESS

7. STATE

8. ZIP CODE

9. REAL PROPERTY INVENTORY CODE(RPIC)

10. COUNTRY

11. DOD COMPONENT

| | LEASED (a) | APPROPRIATED FUND PRIOR 1956 (b) | ALL OTHER ADEQUATE (c) | TOTAL ADEQUATE (d) | TOTAL SUBSTANDARD (e) | ADEQUATE + SUBSTANDARD TOTAL (f) | MOBILE HOME SPACES (g) | DOD SPONSORED (h) |
|---|---|---|---|---|---|---|---|---|
| **TOTAL INVENTORY** | | | | | | | | |
| 12. PREVIOUS TOTAL | | | | | | | | |
| 13. NEW ADDS + | | | | | | | | |
| 14. CONVERSION GAINS + | | | | | | | | |
| 15. CONVERSION LOSSES - | | | | | | | | |
| 16. DISPOSALS - | | | | | | | | |
| 17. OTHER LOSSES - | | | | | | | | |
| 18. PRESENT TOTAL | | | | | | | | |
| **INACTIVE INVENTORY** | | | | | | | | |
| 19. PREVIOUS INACTIVE TOTAL | | | | | | | | |
| 20. REACTIVATIONS - | | | | | | | | |
| 21. INACTIVATIONS + | | | | | | | | |
| 22. INVENTORY LOSSES - | | | | | | | | |
| 23. PRESENT INACTIVE TOTAL | | | | | | | | |
| **VACANCY INFORMATION** | | | | | | | | |
| 24. MOVES OUT | | | | | | | | |
| 25. MOVES IN | | | | | | | | |
| 26. GROSS AVAILABLE OCCUPANCY DAYS | | | | | | | | |
| 27. VACANT - MAJOR REPAIR | | | | | | | | |
| 28. NET AVAILABLE OCCUPANCY DAYS | | | | | | | | |
| 29. VACANT - MINOR MAINTENANCE | | | | | | | | |
| 30. VACANT AVAILABLE | | | | | | | | |
| 31. NET VACANCY PERCENT | | | | | | | | |

| 32. INACTIVE UNITS TO BE EXCESSED | TYPE | ADEQUATE INACTIVE: OFFICER (a) | ENLISTED E9-4 (b) | ENLISTED E3-1 (c) |
|---|---|---|---|---|
| a. ADEQUATE | 33. 1 BDRM | | | |
| | 34. 2 BDRM | | | |
| | 35. 3 BDRM | | | |
| b. SUBSTANDARD | 36. 4+ BDRM | | | |
| | 37. TOTAL | | | |

| WAITING LIST DATA: PAYGRADE | FAMILIES ON WAITING LIST: ADEQUATE (a) | FAMILIES ON WAITING LIST: SUBSTANDARD (b) | WAITING TIME: ADEQUATE (c) | WAITING TIME: SUBSTANDARD (d) |
|---|---|---|---|---|
| 38. OFFICER | | | | |
| 39. E9-E7 | | | | |
| 40. E6-E4 | | | | |
| 41. E3-E1 | | | | |

Figure C-1.--Family Housing Inventory and Occupancy Report.

| FAMILY HOUSING INVENTORY DESIGNATION AND ASSIGNMENT REPORT | | | 1. REPORT PERIOD (YYMMDD) | REPORT CONTROL SYMBOL DD-A&L(A)1082 |
|---|---|---|---|---|
| 2. INSTALLATION NAME | 3. MAJOR COMMAND/EFD | | 4. AREA | 5. TYPE REPORT |
| 6. STATE | 7. ZIP CODE | 8. REAL PROPERTY INVENTORY CODE (RPIC) | a. CONUS / b. US OVERSEAS | a. INDIVIDUAL |
| 9. COUNTRY | 10. DOD COMPONENT | | c. FOREIGN / d. WORLDWIDE | b. SUMMARY |

| | OFFICER QUARTERS | | | | | ENLISTED QUARTERS | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 010-07 (a) | 08 (b) | 05-04 (c) | 03-01 W4-W1 (d) | OFFICER TOTAL (e) | E9-E7 (f) | E6-E4 (g) | E3-E1 (h) | ENLISTED TOTAL (i) | TOTAL ADEQUATE UNITS (j) | SUB-STANDARD TOTAL (k) |
| **ACTIVE ADEQUATE UNITS DESIGNATION** | | | | | | | | | | | |
| 11. 1 BEDROOM | | | | | | | | | | | |
| 12. 2 BEDROOMS | | | | | | | | | | | |
| 13. 3 BEDROOMS | | | | | | | | | | | |
| 14. 4 BEDROOMS | | | | | | | | | | | |
| 15. 5 + BEDROOMS | | | | | | | | | | | |
| 16. TOTAL | | | | | | | | | | | |
| **ACTIVE ADEQUATE UNITS ASSIGNED** | | | | | | | | | | | SUBSTANDARD ASSIGNED |
| 17. 010-07 | | | | | | | | | | | |
| 18. 08 | | | | | | | | | | | |
| 19. 05-04 | | | | | | | | | | | |
| 20. 03-01, W4-W1 | | | | | | | | | | | |
| 21. E9-E7 | | | | | | | | | | | |
| 22. E6-E4 | | | | | | | | | | | |
| 23. E3-E1 | | | | | | | | | | | |
| 24. (OTHER SERVICE) (List) | | | | | | | | | | | |
| 25. (OTHER SERVICES) (List) | | | | | | | | | | | |
| 26. (OTHER SERVICES) (List) | | | | | | | | | | | |
| 27. (UNACCOMPANIED FAMILY) | | | | | | | | | | | |
| 28. (CIVILIAN) | | | | | | | | | | | |
| 29. TOTAL OCCUPIED | | | | | | | | | | | |
| 30. TOTAL VACANT | | | | | | | | | | | |
| 31. TOTAL ACTIVE ADEQUATE | | | | | | | | | | | |

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Figure C-2--Family Housing Inventory Designation and Assignment Report.

d. A family housing vacancy log, NAVFAC 8-11101/20, is available and suggested for use on a daily basis. Monthly or quarterly summaries should not be submitted. Those installations with BEST or WANG capabilities may submit a vacancy log produced by these systems.

4. Instructions for Updating the Family Housing Inventory and Occupancy Report (DD Form 1410) Figure C-1. This report is filled out by-the installation and forwarded to the cognizant EFD. The following are instructions for updating the report prior to submission.

a. Format. All entries must be hand written. This report must be submitted to the EFD no later than 10 working days after the end of the report period.

b. Header Data - Section I

The data in this section will be preprinted by FACSO prior to forwarding to the installation. EFD’s are responsible for ensuring that the header data for each installation within their cognizance is current and correct. The "as of" date for the report is 30 September.

c. Column Headings (a - h) for this Report are Described as

(1) Leased (Column a). These are units generally privately owned, leased by the U.S. Government for use as military public quarters. This includes leased units constructed under the Section 801 Acquisition Program. When one military service or DOD agency acts as an executive agent and leases units for use by another, the executive agent will report subject leased units in its inventory. This category also includes those privately owned units leased by a non-DoD U.S. Government agency for use by DoD personnel. (Example: State Department leasing for a military department; the military department reports the units.) It also includes those units formerly reported as rental guaranty. In addition, military public quarters owned by HUD will also be considered.

(2) Appropriated Fund- Prior FY 1950 Appropriation (Column b). These are housing units acquired incidental to land purchases and other adequate housing units acquired and/or constructed under funding appropriated prior to the FY 1950 Appropriation. Included are units built prior to 1950 previously reported as adequate foreign source. This includes units owned by a foreign government and used by the military service under international agreement.

(3) All Other Adequate (Column c). This category includes all other adequate Government-owned housing units previously reported as: Appropriated Fund FY 1970 and after, Appropriated Fund FY 1950 through FY 1969, Appropriated Fund Relocatable, Capehart, wherry acquired, surplus commodity, permit, USA homes. Include those units acquired after FY 1950 previously reported as foreign source.

(4) Total Adequate (Column d). The sum of column (a) plus column (b) plus column (c).

(5) Total Substandard (Column e), The number of units designated as substandard. Substandard Yen, RAF, etc., housing units regardless of how operated (include previously reported as foreign source substandard).

(6) Adequate and Substandard Total (Column f). The sum of column (d) plus column (e).

(7) Mobile Home Spaces (Column g). The number of Government-owned mobile home spaces (excluding those spaces occupied by Government-owned mobile homes included in column (e)).

(8) DoD Sponsored (Column h). These are domestic rental guarantee units obtained through the 802 Acquisition Program (formerly reported as Wherry Unacquired, Section 810, Rental Guarantee, columns JI thru J3 of the old maintenance report).

d. Row Headings for this Report are Described as: Total Inventory - Lines l2 thru 18

(1) Line 12 - Previous Total. This preprinted line shows the total number of units (active plus inactive) under the control of your installation, on the last day of the reporting period. Any corrections to line 12 must be approved by the cognizant EFD and explained in a keyed footnote on an attached sheet. This line should be identical to the present total line from the prior year’s report.

(2) Line 13 - New Adds. Enter the number of units acquired by means other than conversion during the reporting period. If you are reporting a category of housing for the first time, cite the approval authority and source of the acquired housing on an attached sheet.

(3) Line 14 - Conversion Gains. Enter for each category of housing the number of units added by conversion, improvement, or other action that caused a change in status during the report period; include both those which change from substandard to adequate, as well as those that create new DoD family housing facilities. Conversions will be reported as accomplished as of the beneficial occupancy date.

(4) Line 15 - Conversion Losses. Enter the number of units permanently lost by conversion, diversion, or other action that caused a change in status during the report period; include loss of one unit due to combining of two units to one or actions which upgrade family housing as well as those which convert to nonfamily use.

(5) Line 16 - Disposals. Enter the number of units disposed of and lease cancellations, except for permanent conversions and diversions which occurred for any reason during the report period. Disposals will be reported as effective the date the units are removed from the Defense

Family Housing Property Account. A report of excess houses to the GSA is not considered a disposal until the property is accepted by GSA. Installations will ensure that family housing units so excessed will be included in this report until such time as final disposition occurs. In those cases where all housing or the entire installation is inactivated or excessed, the cognizant EFD will submit this report until final disposition. Until the property is removed from the property account, the units should be shown as inactive on line 19.

(6) Line 17 Other Losses. Enter the number of units lost due to damage or destroyed due to fire, natural causes, etc., during the report period.

(7) Line 18 Present Total. For each column enter the total number of units (active plus inactive) on the inventory the last day of the report. This line is the sum of the entries in lines 12 through 17 (12 + l3 + 14 - 15 - 16 - 17 = 18).

e. Line 19 Through 23 Pertain To Inactive Inventory

(1) Line 19 Previous Inactive Total. This data will be pre-printed by FACSO and should reflect the number of inactive units on the inventory as of the last day of the preceding report period. This data should be identical with the Present Inactive Total of the preceding report. Any corrections to previous totals must be explained in a keyed footnote on an attached worksheet.

(2) Line 20 Reactivations. Enter the number of units reactivated during the report period.

(3) Line 21 Inactivations. Enter the number of units inactivated during the report period.

(4) Line 22 Inventory Losses. Enter the number of inactive units dropped from the Defense Family Housing Property Account during the report period. This includes disposals and all other losses of inactive units.

(5) Line 23 Present Total Inactive. For each column enter the number of units that were inactive the last day of the report period. This line is the algebraic sum of entries in lines 19 through 22 (19 - 20 + 21 - 22 = 23).

f. Line 32 Pertains to Inactive Units to be Excessed. Enter the number of inactive units reported which will be excessed to the GSA prior to the next report. On line 32(a), enter inactive adequate units to be excessed of those reported on line 23, column (d). On line 32(b) enter inactive substandard units to be excessed of those reported on line 23, column (e).

g. Lines 24 through 31 Pertain to Vacancy Information. This section can be completed with relative ease if information on move-ins and move-outs are recorded daily and subtotaled on a monthly basis.

(1) Line 24 Move Outs. Enter under each category the number of move outs during the report period.

(2) Line 25 Move In. Enter under each category the number of move ins during the report period.

(3) Line 26 Gross Available Occupancy Days. Enter the gross number of unit days available for occupancy in the report period. This is computed by multiplying the number of units active for each category for the entire reporting period by the number of days in the report period (365 or 366 for leap year). Individual computations are required for units that were not available for occupancy during the entire report period. When you have inactive units shown on line 19 deduct the number from line 23 and multiply the result by the number of days in the reporting period. To this total add or subtract as appropriate the number of days available for those units which were reactivated or inactivated during the period.

Examples of Line 26 Calculations

Installation "A" has 200 units. All were available for occupancy during the entire reporting period (Oct l through Sep 30).

200 X 365 = 73000 Total Gross Available Occupancy Days

Installation "B" has 200 units. One hundred ninety units were available for occupancy during the entire reporting period. Ten units were inactivated on Oct l due to fire damage. Five units were reactivated upon occupancy on March l. Three units were reactivated upon June 1. The remaining 2 units are still inactive.

| | | |
|---|---|---|
| 190 X 365 = | 69350 | (190 units active Oct l - Sep 30) |
| 5 X 214 = | 1070 | (5 units active Mar 1 - Sep 30) |
| 3 X 122 = | 366 | (3 units active Jun 1 - Sep 30) |
| | 70786 | Total Gross Available Occupancy Days |

Another way to check your figures would be to calculate the number of down days and subtract them from the total possible days if all units were active:

Installation "C' has 150 units. All were available for occupancy during this report period. Fifty units were constructed with a beneficial occupancy date of April 15. The total inventory for the 30 September report is 200.

| | |
|---|---|
| 150 X 365 = 54750 | (150 units available Oct 1 - Sep 30) |
| 50 X 169 = 8450 | (50 units available Apr 15 - Sep 30) |
| 63200 | Total Gross Available Occupancy Days |

Note that in all 3 examples the installations each had 200 units in their inventory as of 30 September, yet each installation reported a different number of total gross available occupancy days. This occurred

because each experienced different inventory actions within the reporting period.

(4) Line 27 Vacant Major Rehabilitation. Enter the number of days active units were vacant for major rehabilitation, repair, alterations or conversion work.

(5) Line 28 Net Available Occupancy Days. Subtract line 27 from line 26 and enter the difference.

(6) Line 29 Vacant Minor Maintenance. Enter the number of days that active units were vacant for change of occupancy maintenance. Formerly reported as routine maintenance.

NOTE: Although individual situations must be considered on their particular points, the following generalities may be used in distinguishing between the routine M&R and major rehabilitation:

Routine M&R will ordinarily consist of cleaning, refinishing, painting, and other minor repairs that can be expected incident to one occupancy. In this sense, it will be expected that the same type of work will be performed again after one other occupancy, and the full extent of such work would not normally be expected to exceed one work week.

Major rehab will ordinarily consist of the replacement of wall, replacement of a floor, complete re-wiring of the unit, and other items of a major nature which have been accumulating for some time and which must now be performed.

(7) Line 30 Vacant and Available. Enter the number of days active units were vacant other than major rehab or minor maintenance. Units acquired either by new construction, conversion, leasing, etc., should have figures reflected here from the day of beneficial occupancy to the date of the first occupancy.

(8) Line 31 Net Vacancy Percent. To determine the net vacancy percent divide the sum of lines 29 and 30 by line 28. Enter the percentage figure (by moving the decimal two places to the right) and round to two decimal places.

h. Lines 33 through 37 Pertain to Adequate Inactive Designation. Columns (a) Officer; (b) Enlisted E9-E4; (c) Enlisted E3-El. For each line enter the number of units by bedroom and paygrade designation which are reported as inactive on line 23 column (d).

i. Lines 38 through 41 Pertain to Waiting List Data

(1) Column (a) Families on the Waiting Lists. For each line enter the number of families on all adequate waiting lists as of the last day of the report period. Each member must be counted only once regardless of the number of waiting lists they may be on.

(2) Column (b) Families on Substandard Waiting Lists. For each line enter the number Of families on all substandard waiting lists. Each family must be counted only once regardless of the number of waiting lists they may be on.

(3) Column (c) Waiting Time - Adequate. For each paygrade enter the average number of months a military member must wait for adequate quarters. Entries should be made in increments of whole months; e.g., two weeks should be entered as one month, less than two weeks should be zero.

(4) Column (d) Waiting Time - Substandard. For each paygrade enter the average number of months a military member must wait for substandard quarters.

5. Instructions for Completing the Family Housing Inventory Designation and Assignment Report (DD Form 1411) figure C-2

a. General

(1) This part of the report provides information on the number and size (bedroom count) of adequate and substandard family housing units by the pay grade group for which they are designated and occupied, as of 30 September of each year.

(2) Adequate inventory data reported on DD Form 1410 line 18 column (d) less line 23, column (d) must equal the total active adequate units designation reported on DD Form 1411, line 16 column (j) for the same period. Substandard total inventory reported on DD Form 1410 line 18 column (e) less line 23 column (e) must equal the substandard total one line 16 column (k) as reported on DD Form 1411 for the same period.

b. Lines 1 through 10 Pertain to Header Data

c. Lines 11 through 15 Pertain to Active Adequate Units Designation

(1) The numbers in this section reflect the entries from the previous report period and will be pre-printed by FACSO.

(2) Enter the total number of active adequate units by the number of bedrooms which have been designated for use by the various pay grade groups indicated in column headings (a-k). This data will reflect the pay grade groups for which the units have been designated, not the pay grade of the current occupant.

(3) If there have been no changes in designation, reactivations, inactivations, and acquisitions, there will be no change made in this section. If there have been deactivations, inactivations, etc., the numbers must be changed to reflect the total number of adequate units available at the end of the report period. If there have been inadequate units reported as conversion gains or new additions, the numbers will have to be added to the appropriate adequate grade designation by bedroom composition. Conversely, if there have been any disposals, conversions or other losses of adequate units they must be removed by grade designation

and bedroom composition. Housing units designated for civilians will be reported under the respective military equivalent pay grade group.

(4) If there is no designation of enlisted units by senior/ junior personnel, the total number of enlisted units will be entered in the Senior enlisted column.

d. Column (a) 010-07. Column (b) 06, Column (c) 05-04. Column (d) W4-WI.

e. Column (e) Officer Total: For each line enter the sum of columns (a) + (b) + (c) + (d).

f. Column (f) E9-E7. Column (g) E6-E4. Column (h) E3-El.

g. Column (i) Enlisted Total: For each line, enter the sum of columns (f) + (g) + (h).

h. Column (i) Total Active Adequate Units: For each line enter the sum of column (e) + (i). Data on line 16 column (j) must equal the difference between the total adequate inventory reported on line 18 column (d) of DD Form 1410 less the inactive adequate inventory reported on line 18 column (d) of the DD Form 1410 for the same report period.

i. Column (k) Total Active Substandard Units: For each line, enter the number of substandard units by number of bedrooms. Data on line 16 column (k) must equal the difference between the total active substandard inventory reported on line 18 column (e) of the DD Form 1410 and the total inactive substandard inventory reported on line 23 column (e) of the DD Form 1410 for the same reporting period.

j. Line 16 Total: For each column enter the sum of lines 11 + 12 + 13 + 14 + 15.

k. Lines 17 through 28 Pertain to Active Adequate Units Assigned.

l. Columns (a) through (d) and (f) through (h). Enter the number of occupants by the sponsors pay grade designation for lines 17 through 23. Include members of other services, unaccompanied families (families authorized to remain in quarters while the sponsor is absent) and civilians.

m. Line 29 Pertains to Total Occupied. For each column enter the sum of lines 17 + 18 + 19 + 20 + 21 + 22 + 23. (Lines 24 through 28 are not added because they are already included in lines 17 through 23.)

n. Line 30 Pertains to Total Vacant. For each column enter the number of vacant units at end of the report period.

o. Line 31 Pertains to Total Active Adequate. For each column enter the sum of lines 29 + 30. The numbers for each column should equal the total for the corresponding column on line 16 (line 16 column (c) must equal line 31 column (c).

p. Lines 32 through 35 Pertain to Occupancy by Service and TAR Report. For each military service enter the number of families who occupy quarters at your installation which is broken out by officer, enlisted, etc. These figures must accurately reflect assignments to family housing quarters as of 30 September, and should reconcile with the DD Form 1411 worksheet for the corresponding report period.

# APPENDIX D

## FAMILY HOUSING RENTS AND CHARGES

1. Text Reference. See paragraphs 1203, 1216.6, 1225.1, 1231.4, and 1231.11b.

2. General Information

a. Information. Rents and charges established for Marine Corps family and mobile home spaces are determined per the provisions of this appendix, and other DoD and DON instructions which are applicable to the Marine Corps.

b. Applicability. Family housing, funded under the FH,N&MC when operated on a rental basis, including:

(1) Adequate public quarters occupied by civilians, except in those areas where such quarters are provided to civilians in lieu of a housing allowance authorized in civilian personnel regulations (see paragraph 1203.1).

(2) Inadequate Government-owned quarters reported per paragraph 1203.2 under the substandard housing category.

c. Policy. It is the policy of the DON to establish rents and charges for quarters on the basis of the reasonable value of the accommodations as determined by comparison with equivalent private rental facilities and modified by allowance adjustments. Rent schedules and charges for utilities furnished by the Government (i.e., not paid directly to the utility company by the tenant) shall be adjusted periodically. An exception to the periodic appraisal may be granted by the CMC upon request or as provided for in this Manual. Such exception may be granted when:

(1) The present fair rental value exceeds 75 percent of the military occupant’s BAQ.

(2) It is clearly indicated that a reappraisal will not result in a fair rental value lower than 75 percent of the occupant’s BAQ.

3. Establishing Rents and Charges. Rental rates and charges for facilities made available in connection with the occupancy of rental quarters shall be based on the reasonable value of the quarters and facilities to the occupant in the circumstances under which the quarters and facilities are provided, occupied, or made available. Rates may not be set to provide an inducement in the recruitment or retention of personnel or as a means to encourage the occupancy of the other Government quarters. Instructions for determining rents and charges for mobile home spaces are provided in chapter 1, section 3 of this Manual. Professional fee appraisers will be used to conduct all appraisals.

a. Adjustments

(1) Periodic (Cycle Year) Adjustments Based on Survey of the Private Rental Market.

(a) Every fifth year or when the basic rental rate has been increased by 30 percent through application of the rent series of the U.S. city average Consumer Price Index (CPI), whichever comes first.

(b) Every third year if for any reason valid and realistic comparability with private rental rates has not been established.

(c) Any year when changes in the private rental market in the nearby established community indicate a need to adjust basic rental rates on the basis of a survey of the rental market.

(2) Annual (Interim Year) Adjustments Based on Chances in the CPI.

Annual adjustment in the basic rental rate to be effective 1 February of each year shall be made applying the percent change in the CPI from the month in which the previous adjustment was based. Though effective in February, the adjustment shall be based on the preceding September CPI data.

(a) When the private rental market survey is made during the months of August through January, no CPI adjustment will be made on the upcoming 1 February but will be deferred until the following February. Such CPI adjustments will be based on the changes in the CPI from the actual date of the survey through the upcoming September.

(b) When the private market survey is scheduled to be made during the months of February through July, no CPI adjustment will be made on 1 February of that year but will be deferred until 1 February of the following year.

(3) Newly Acquired Quarters. The initial survey to establish comparability with private rental accommodations shall be made upon acceptance of the facility, and the corresponding rental rates shall be made effective upon occupancy. The initial CPI adjustment in rental rates shall be made as follows:

(a) When the initial survey of the private rental market is made during the months of February through July, the initial CPI adjustment will be made on the upcoming 1 February.

(b) When the initial survey of the private rental market is made during the months of August through January, the initial CPI adjustment will be made on the procedure set forth in paragraph 3a(2)(a) of this appendix.

b. Determining Utility Charges. Utility charges shall be determined as prescribed in MCO 7310.14.

4. Responsibilities of the Family Housing Director/Manager. The Family Housing Director/Manager will ensure the rents and charges are adjusted as appropriate per the provisions of this Manual. The Director/Manager will notify the tenants of any changes in rents and charges no later than the first day of the month preceding the effective date.

5. Substandard Quarters. It is Marine Corps policy that assignment of Marine Corps managed substandard quarters generally should be restricted to junior enlisted personnel. Personnel promoted or otherwise becoming eligible for adequate public quarters may be allowed to remain in inadequate quarters. These personnel may be placed on the waiting list for adequate public quarters as of the date they become eligible. Installation commanders may authorize higher ranking personnel to voluntarily occupy inadequate quarters at their option. Substandard quarters will not be used as temporary housing while awaiting assignment to adequate quarters or when vacating adequate quarters.

# APPENDIX E

# FAMILY HOUSING SELF-HELP PROGRAM

1. Text Reference. See paragraph 1401.7.

2. Purpose. The occupant of Marine Corps family housing shall not be solely responsible for maintenance of their quarters but is requested to assist the Marine Corps in its effort to provide adequate economic housing to as many military families as possible. Simple household-type repairs and maintenance tasks which are normally performed by tenants require an inordinate expenditure of housing maintenance funds. Occupants taking responsibility for some of the simpler tasks will conserve these funds and further the goal of providing better housing for all military families.

3. Application

a. Occupants of Marine Corps family housing are responsible for proper maintenance of their quarters. This responsibility, insofar as practicable, includes the same routine housekeeping and related servicing of their living units and immediate grounds as would be expected of tenants in private housing. Section 4, part B of chapter 1 delineates specific occupant responsibilities. This appendix is not intended to conflict with those responsibilities.

b. A backlog of maintenance and repair exists in Marine Corps family housing. Funding constraints and the shortage of skilled craftsmen at the installations make it essential that the major effort of these artisans be concentrated on the more comprehensive and difficult maintenance tasks. However, numerous maintenance jobs now being performed by or restricted to skilled craftsmen may be within the capability of the occupants to perform. This self-help concept will ensure that all available funds are programed primarily for major requirements which can only be accomplished by skilled maintenance personnel or contractual forces. This will result in more efficient operation and maintenance of family housing assets within existing resources and provide better housing for Marine Corps families.

c. Paragraph 7 of this appendix provides examples of types of work which are considered appropriate for a self-help program, subject to local approval by installation commanders.

4. Limitations

a. Work authorized under the self-help program is limited to maintenance and minor repairs only. Extensions, expansions, alterations, and improvements are specifically excluded.

b. The use of Government-furnished materials, equipment, and technical assistance is authorized in the accomplishment of self-help projects if:

(1) The self-help project is in the nature of normal or routine maintenance and repair, such as the clearing of minor plumbing stoppages and limited interior touchup painting.

(2) The material and/or technical assistance provided is available locally within financial constraints.

c. The term "self-help," as defined by this Manual, does not apply to the following:

(1) Projects accomplished under work order by military personnel who are permanently assigned or temporarily detailed to maintenance or public works departments.

(2) Projects which would involve working in or about utility systems of the structure, including but not limited to electric, gas, and air-conditioning.

5. Supervision

a. The operation of the self-help facility is a function of the housing organization. Adjustments to the working hours of the housing staff are allowed in order to accommodate the occupants.

b. When possible, qualified personnel should be made available to provide technical guidance and supervision, as required, in the execution of self-help tasks.

c. It is recommended that instruction periods be periodically scheduled to acquaint newly arrived occupants with the method by which normal or routine tasks may be accomplished and the procedures for obtaining tools and materials. The instructions should be given by qualified maintenance personnel and cover all types of preventive maintenance, repairs, and housekeeping expected of the occupants. The instructions should, in addition, advise occupants as to the proper procedures to obtain approval of self-help projects and the availability of technical guidance.

6. Materials and Tools

a. Materials to be stocked and made available to occupants should be of the type normally requiring no specialized skill or knowledge for application. Consider maintaining a supply of fertilizer, grass seed, furnace filters, fuses, paint, floor tile, caulking, and small hardware items, such as faucet washers, hinges, screws, sink stoppers, and other similar items.

b. Lawn cutting and grounds care are normally the occupant’s responsibility. However the installation may maintain a reasonable inventory of lawn care equipment and materials to ensure these items are available to all family housing occupants.

c. The family housing officer shall be responsible/accountable for all materials and tools previously described.

7. Types of Self-Help Projects. The projects listed herein are suggested as suitable for self-help. Occupants are not to be limited by the list and are encouraged to submit additional ideas to installation commanders.

a. Adjustments to building hardware. Loose screws in hinges, doors, windows, and fixtures can damage the structure. The occupant can correct the problem with a screwdriver.

b. Freeing of plumbing stoppages. Many plumbing stoppages can be cleared with hand plungers; some more serious ones can be cleared by commercial chemical compounds available within the exchange system.

c. Replacement of washers and other readily accessible fixtures. Worn-out washers in faucets make the fixture difficult to operate and waste water. Most washers can be replaced with simple handtools and very little expertise.

d. Cleaning/replacement of heating and/or air-conditioning filters. The normal care of most heating/air-conditioning systems is well within the mechanical capabilities of housing occupants. Improvements in cleanliness and operation are well worth the small effort required for the cleaning/replacing of these filters by the housing occupants.

e. Replacements of and repairs to screens. Temporary or permanent repairs to screens can sometimes be accomplished by occupants with very little inconvenience or effort, thereby avoiding the need for expensive routine service calls. Government materials and tools may be made available for this purpose. Since many of the requirements result from accidents and, therefore, cannot be considered normal wear and tear, occupant participation in the repair is appropriate. However, it is not intended that occupants be permitted/required to attempt repairs which are beyond their capabilities.

f. Spreading of fertilizer and the planting of grass seed. Lawn care, to the extent expected of tenants in private housing, is the responsibility of the occupant of military-owned family housing. Accordingly, the spreading of Government-provided fertilizer and grass seed can be reasonably expected of the occupant, within guidance and time provided by the installation.

g. Replacement of broken or worn floor and wall tile. Minor replacements of broken floor and wall tile, which require no special aptitudes and very little effort, should be accomplished by the occupants with materials provided by the installation. Many capable occupants would willingly accomplish these minor replacements in order to enjoy the aesthetic and practical advantages. Extensive floor and wall tile replacement programs should be accomplished through regular family housing repair programs.

h. Caulking of exterior and interior surfaces, such as around sinks and windows. Prompt replacement of loose and deteriorated caulking noticed by the occupant can be readily accomplished by the occupant. The work is neither difficult nor time consuming and requires very little in the way of tools and materials. Advantages accrue to the occupant in terms of comfort and improved appearance. The installation benefits through elimination of a source of occupant dissatisfaction, conservation of manpower, and correction of a deficiency which result in extensive deterioration of the facility.

# APPENDIX F
# OCCUPANTS' RESPONSIBILITY AND LIABILITY FOR MARINE CORPS FAMILY AND BACHELOR HOUSING

1. Text Reference. See paragraphs 1402, 1516.10, 2003.1, and appendix G.

2. Purpose. This appendix provides the policy guidance concerning occupants' responsibilities for the care and maintenance of family housing and occupants' liability for damage to family and bachelor housing, equipment or furnishings.

3. Background

a. Prudent housing management involves a reasonable degree of responsibility by the occupant for the care and maintenance of the housing unit assigned to the member.

b. Public law and DoD guidance provide that action may be taken to obtain voluntary or involuntary deductions from the member's pay for the cost of repairs or replacement due to loss or damage of family and bachelor housing, equipment, or furnishings caused by abuse or negligence, and the cost of cleaning when a family housing occupant fails to satisfactorily clean the unit upon termination of assignment.

4. Policy

a. Family housing occupants are responsible for routine maintenance, minor repair, operation, housekeeping, and related servicing of an assigned dwelling, Government-owned furnishings, and maintenance of designated grounds as would be expected of tenants in private rental hOusing. Occupants are provided clean, livable, well-kept quarters and are required, upon vacating, to return the assigned quarters and the assigned grounds in a clean condition, ordinary wear and tear excepted.

b. Bachelor quarters residents shall be responsible for routine housekeeping and for reporting items for repair or replacement to the appropriate bachelor quarters management personnel.

c. All occupants shall be clearly informed of their responsibilities and potential liabilities when assigned Government quarters (family or bachelor). Occupants held accountable for any loss or damage of Government property will be given due process protection per DoD 7200.10-M (NOTAL). The monthly rate of collection for damages or loss will be as shown in DoD Pay Manual, tables 7-7-3 and 7-7-6.

d. The assigned occupant is liable for loss or damage to any Government family or bachelor housing unit, equipment, or furnishings caused by abuse or negligence of the occupant and occupant's dependents or guests. The occupant is responsible to correct any loss or damage caused by abuse or negligence, or reimburse the Government. Occupants will be given the opportunity to voluntarily reimburse the Government. Determination of liability is made per DoD 7200.10-M. In making determinations of liability and waivers, the following definitions shall be used:

(1) Abuse. Conduct evidenced by unauthorized use, willful neglect, or damage to Government property.

(2) Negligence. The failure to act as a reasonably prudent person would have acted under similar circumstances.

(3) Gross Negligence. An extreme departure from the course of action to be expected of a reasonably prudent person, all circumstances being considered, and accompanied by a reckless, deliberate, or wanton disregard for the foreseeable consequences of the act. Abandonment of quarters by the occupants shall be considered to be gross negligence.

(4) Willful Misconduct. Conduct evedenced by intentional damage, destruction, or loss of Government property.

e. The maximum financial liability an occupant may incur is limited to an amount equivalent to 1 month's base pay, collected as provided for in DoD Pay Manual, tables 7-7-3 and 7-7-6. This liability limitation does not apply if the commanding officer of the activity having management control of family or bachelor housing assets determines that the damage or loss has been the result of:

(1) Gross negligence or willful misconduct by the occupant.

(2) Gross negligence or willful misconduct by the occupant's dependents or a guest of either the occupant or the occupant's dependents. In the absence of evidence to the contrary, occupants are presumed to be aware of risks involved when inviting guests upon the premises.

f. Nothing in paragraph 4e, preceding, will restrict or limit the right of the United States to seek full recovery from available insurance owned by the occupant to the limit of the actual loss or damage for which the occupant or the occupant's dependents and guests is determined to be liable.

g. The CMC has been delegated the authority to compromise or waive claims pursuant to Title 10, U.S.C. 2775, if, based upon the unique circumstances of the individual case, it is determined that the compromise or waiver of the claim is in the best interest of the United States.

h. Appendix G provides a condition of occupancy form for family housing occupants to be completed so that all service members are aware and understand the rules regarding occupant responsibilities and liabilities when assigned Marine Corps family housing.

5. Action. Activity commanders shall issue appropriate instructions implementing the policies contained in this appendix.

6. Reserve Applicability. This appendix is applicable to the Marine Corps Reserve.

**APPENDIX G**

**CONDITION OF OCCUPANCY FORM FOR MILITARY FAMILY HOUSING**

1. Text Reference. See appendix F.

2. Occupancy. _____ is assigned to _____ to be occupied as military family housing of the United States on _____.
(date)

3. Occupant Use. The occupants shall use the premises solely as a single-family residence for themselves and their dependents. Use of the unit for any other purpose, including the shelter of any additional number of persons, except temporary guests, is prohibited without prior written consent of the housing representative. Temporary guests are those persons who occupy property for no more than 3 consecutive weeks.

4. Good Repair. Except as otherwise provided herein, the housing authority shall maintain the property in good repair and habitable condition and shall be responsible for all repairs not due to the abuse or negligence of the occupant, their dependents or guests during occupancy. Repairs or replacement of equipment provided due to normal wear and tear shall also be at the expense of the housing authority.

5. Pets. If pets are allowed on the premises, the occupants understand that arrangements for having the house flea bombed and deticked as necessary and arrangements for cleaning carpeting (if any) at the termination of occupancy are their responsibility. The occupants further understand that any damage caused to the unit or grounds by their pet(s) is also their responsibility.

6. Condition of Property. The housing authority and the occupant inspected the property, and both parties agree that the property is in a fit and habitable condition. Any discrepancy items noted by the occupant shall be submitted in writing and received by the housing authority generally within 15 days of occupancy.

7. Plumbing and Appliances. The occupant shall keep the premises, including all plumbing fixtures, facilities, and appliances as clean and safe as condition permits and shall attempt to unclog and keep clear all waste pipes, drains, and water closets where possible. At the termination of occupancy, all appliances and equipment shall be in good working order and the premises shall be in good clean condition, normal wear and tear excepted.

8. Use and Repair of Facilities. The occupants shall use all electrical, plumbing, sanitary, heating, ventilating, air-conditioning, and other fixtures, facilities, and appliances in or on the premises in a reasonable manner. Any damage caused by either the occupants, their dependents, or guests beyond normal wear and tear shall be repaired at the occupants’ expense.

9. Damaging Property. If the occupant willfully or negligently destroys, defaces, damages, impairs, or removes any part of the premises (including fixtures, facilities, and appliances) or willfully or negligently permits any person to do so, the occupant shall be held responsible for the damages.

l0. General Maintenance. The occupants shall at their own expense: (a) keep up and preserve in good condition any lawn, vines, shrubbery and gardens and keep all fences in good repair, normal wear and tear excepted; (b) remove leaves, sticks and other debris that accumulate on the property; (c) promptly remove ice and snow as necessary or required; (d) furnish their own light bulbs; (e) replace or repair all broken or damaged glass, screens and locks occurring during their occupancy, normal wear and tear excepted. Any repairs or replacements of property, equipment, or appliances required due to the abuse or negligence by acts of commission or omission of the occupants, their dependents or guests, shall be paid for by the occupant. The consent of the housing manager must be obtained before the occupant places any exceptionally heavy articles, such as water beds, in the unit which may damage the unit's structural integrity.

11. Notice of Defects or Malfunction. The occupant shall promptly notify the housing office whenever the structure, equipment or any fixture contained therein becomes defective, broken, damaged or malfunctions in any way.

12. Occupant Conduct. Occupants shall conduct themselves in a manner that will not disturb their neighbors.

13. Health and Safety. The occupant shall comply with all health and safety regulations imposed by the local command.

14. System Overloads. The occupant shall not install or use any equipment that will overload any gas, water, heating, electrical, sewage, drainage, or air-conditioning systems of the assigned premises.

15. Smoke Detectors. It is the responsibility of the occupant to check smoke detectors periodically during occupancy and replace batteries as necessary to keep the smoke detectors in proper working condition and to report any malfunctions to the housing office.

16. Insurance. It is recommended that the housing occupant who may be held liable for damage or loss to the family housing unit equipment, or furnishings, obtain a comprehensive insurance policy which provides for protection of their personal property and the unit to which they are assigned.

17. Redecorating and Alterations. The occupant shall obtain written consent from the housing authority before redecorating or making any alterations, additions, or improvements. Such alterations may, at the option of the housing authority, remain with the property or be removed by the occupant. When removing such alterations the premises shall be returned to its original condition at the expense of the occupant.

18. Periods of Absence. The occupant shall notify the housing office whenever extended absences from quarters are anticipated.

19. Access to Property by the Housing Managers and their Duly Designated Representatives. Upon reasonable notice to the occupant and at reasonable times, the installation commander or a duly designated representative may enter

the premises to: (a) inspect the property, (b) make necessary repairs, alterations or improvements, and (c) supply necessary or agreed upon services. If the occupants are not at home when the premises are to be entered, the housing representative shall have (in decreasing order of preference) a representative from the occupant's command or unit, a security officer, or a disinterested third party accompany them when entering the quarters.

20. Neglect and Costs. If at any time during the term of this occupancy, the housing authority is required to make repairs to the property or its equipment for damages caused by the abuse or negligence of the occupant or the occupant's dependents or guests, the occupant understands that the repairs shall be made at the occupant's expense. As appropriate, the housing occupants should be afforded the right to complete the necessary repairs either by outside contractor or on their own.

I HAVE READ, AND UNDERSTAND ALL OF THE CONDITIONS CONTAINED HEREIN.

_____ _____

Sponsor Date Housing Representative

_____

Spouse Date

# APPENDIX H

## INSTRUCTIONS FOR COMPLETING DD FORMS 1391 AND 1391c

1. Text Reference. See paragraphs 1813 and 1823.1.

2. General Information

a. Completed DD Form 1391 (Military Construction Project Data) (figure H-1) essentially provides a description of the work to be done and the justification for improvement or major repair projects, as well as physical data description of the facility and lump sum estimated costs. This document is used to provide comprehensive information necessary for review of a project at each approval authority level, including Congress.

b. The DD Form 1391c (Military Construction Project Data--continued) (figure H-2) shall be used when additional space is required to complete items 10 and 11 (description of proposed construction/requirement on DD Form 1391). Heading information required for DD Form 1391c shall reflect the same information contained on the DD Form 1391 heading. NAVFAC P-930 shall be used for guidance in preparing DD Form 1391c when not covered herein.

c. Additionally, a separate DD Form 1391c will be submitted on each project for the purpose of providing supporting documentation. Do not use the same DD Form 1391c used for continuation of DD Form 1391.

d. The DD Form 1391 shall be completed as instructed in the following paragraphs and, for purposes of the program, submitted for improvement and major repair projects.

3. Instructions for Completing DD Form 1391 (1 Dec. 1976). Military Construction Project Data. The instructions below apply to all facility groups. ALL COSTS MUST BE SHOWN IN CURRENT YEAR DOLLARS - DO NOT ESCALATE! Refer to figure H-1 for additional clarification.

a. ITEM 1 - COMPONENT. Enter "MARINE CORPS"

b. HEADING. Enter the fiscal year of planned accomplishment.

c. ITEM 2 - DATE. Enter the date prepared (e.g., 26 Sep 1989). Subsequent revisions should reflect new dates.

d. ITEM 3 - INSTALLATION AND LOCATION. Enter the official name of the installation and location, city and state or city and country as contained in the SNDL. Do not abbreviate. Use code name or designations only when necessary to preclude security classification or when an official name is not available.

e. ITEM 4 - PROJECT TITLE. Include the type of work being done, i.e., repair or improvement, the facilities involved, and the name of the housing site.

f. ITEM 5 - PROGRAM ELEMENT. Leave blank.

g. ITEM 6 - CATEGORY CODE. Leave blank.

h. ITEM 7 - PROJECT NUMBER. Each project will be assigned a project number by the originating installation. Identification numbers will not be changed during the life of the project even if the project is carried into subsequent years. Changes or revisions in scope or estimated cost should be indicated by adding to the number "(Rev. 1), (Rev. 2)" and so on.

i. ITEM 8 - PROJECT COST ($000). Enter the total estimated project cost in thousands of dollars rounded to one decimal place. This amount must be the same as the TOTAL REQUEST ESCALATED shown in the "cost" column in Item 9.

j. ITEM 9 - COST ESTIMATES. Summarize work items from the detailed listing included on the Cost Estimate, NAVFAC 11013/7, described in appendix I. The total cost of these items, to be inserted at the bottom of the "cost" column, must be the same as the amount reported in Item 8.

(1) ITEM. Provide a brief description of the proposed work as described in Item 9 above.

(2) U/M (Unit of Measure): Use the accepted two character abbreviation (e.g., SF, SY, LF, EA, et cetera) associated with each "item" listed. Where it is not feasible to show a unit of measure, use LS (Lump Sum).

(3) QUANTITY. Enter the required number of units of measure comprising the "item" entry. Where "LS" is the unit of measure, enter a dash.

(4) UNIT COST. From the Cost Estimate, enter the appropriate unit costs, EXCLUDING both ESCALATION and the OVERHEAD AND PROFIT (OH&P), for each "item" entry where a unit of measure is indicated. If the unit of measure is "LS," enter a dash.

(5) COST ($000). EXCLUDING both ESCALATION and OVERHEAD AND PROFIT (OH&P), enter the cost for each "item" in thousands of dollars, rounded to one decimal place (e.g., $58,370 - $58.4). If "quantity' and "unit" columns are completed, this entry should be the product of those numbers.

(a) ENGINEERING ESTIMATE. List "ENGINEERING ESTIMATE" in the "item" column and, in the "cost" column, enter the sum of the costs entered. This figure should be the same as the "engineering estimate" from the respective facility group cost estimate.

(b) OVERHEAD AND PROFIT. Enter the appropriate total from the respective facility group Cost Estimate. In the "item" column, indicate "CONTRACTOR OVERHEAD AND PROFIT" or "ACTIVITY OVERHEAD," as appropriate, followed, in parentheses by the percentage applied.

(c) SUBTOTAL. List "SUBTOTAL" in the "item" column and, in the "cost" column, enter the sum of the costs shown.

(d) CONTINGENCY. List "CONTINGENCY" in the "item" column followed, in parentheses, by the appropriate rate. Justify any rate exceeding 5 percent. Multiply the rate times the "subtotal" and enter the result in the "cost" column.

(e) TOTAL CONTRACT COST. List "TOTAL CONTRACT COST" in the "item" column and, in the "cost" column, enter the sum of the "subtotal" and the "contingency" costs.

(f) SUPERVISION, INSPECTION, AND OVERHEAD (SIOH). List "SIOH" in the "item" column followed, in parentheses, by the appropriate rate as stipulated in NAVFACINST 7820.1. Multiply this rate times the "total contract cost" and enter the result in the "cost" column.

(g) DESIGN. In the "item" column, list "DESIGN" followed, in parentheses, by the appropriate rate (note: statutory limit is 6 percent). Multiply the rate times the "total contract cost" and enter the result in the "cost" column. For improvement projects, enclose this entry in parentheses to indicate it is nonadditive.

(h) TOTAL REQUEST (FY __ DOLLARS): List "TOTAL REQUEST (FY __ DOLLARS)" in the "item" column showing the fiscal year of the cost estimate. In the "cost" column, enter the sum of the "total contract cost," "SIOH," and "design" if appropriate.

(i) TOTAL REQUEST ESCALATED. Enter "TOTAL REQUEST ESCALATED" in "item" column followed, in parentheses, by the escalation factor(s) applied to the "total request" to reflect the value of the project in the proposed program year. This entry should be made here and in Item 8.

(j) Note the additional work to be done in the "item" column if repairs are to be accomplished along with improvements (or vice versa), under the same or concurrent contracts, by use of other funds. Enter the amount of such other funding in parentheses in the "cost" column, but do not add it to the "total request" or "total request escalated."

k. ITEM 10 - DESCRIPTION OF PROPOSED CONSTRUCTION. Provide a clear and concise description of all principal features of the required work and its correlation with the various data entered in Item 9 whether the units are designated for flag, general, field grade or company grade officers, SNCO, NCO, or junior enlisted or both officers and enlisted.

l. ITEM 11 - REQUIREMENT. At the end of item 10, draw a line across the page, border to border, and add "11. REQUIREMENT.' The survival of a project through the various review levels often depends on the information contained in this section. It is vital, therefore, that the data be presented in a clear, concise, and convincing manner. Should additional space be required, use a separate DD Form 1391c.

(1) PROJECT. Provide a one sentence statement indicating what this project provides.

(2) REQUIREMENT. Provide detailed, informative statements as to precisely why the project is needed. Use positive statements to support the requirement and avoid the use of such words as "inadequate," "uneconomical," and "necessary" unless they are fully explained.

(3) CURRENT SITUATION. Describe how and under what conditions the requirement is presently being met. Comments should support the stated requirement and include the identity and description of the facility as well as the reason they are considered unsuitable for continued use.

(4) IMPACT IF NOT PROVIDED. Describe the manner and extent of impact on the housing of military personnel if the project were not approved.

(5) RELATED PROJECT. Enter the title and number of each previous or current project which is related to this project in any way (if applicable).

(6) ADDITIONAL INFORMATION. Any pertinent information which does not appropriately belong under one of the preceding headings (use if applicable).

4. Instructions for Completion DD Form 1391c (l Dec. 1976). Military Construction Project Data Supporting Documentation. The instructions below apply to supporting documentation for each project. Refer to figure H-2 for clarification. Use as many sheets as necessary to provide the information requested. This form may also be used as a DD Form 1391 continuation sheet, but do not use the same sheet for both purposes.

a. ITEMS 1 thru 4. Enter the information from the corresponding blocks of the DD Form 1391.

b. ITEM 5 - PROJECT NUMBER. Enter the number from block 7 on the respective DD Form 1391.

c. SUPPORTING DOCUMENTATION

(1) Unit Composition and Billet Designation.

(a) Enter the number of dwelling units and buildings affected, the building type (single, duplex, townhouse, apartment, trailer space, garage, community center, et cetera) and number of stories (including finished basements), number of bedrooms in each unit, number of baths, normal occupant rank or rating (irrespective of the category code), and the appropriate category code from the NAVFAC P-72.

(b) Enter the number of units, the year built, when and how they were acquired (construction program, transfer from another agency, conversion to family housing, et cetera), the estimated remaining useful life as family quarters after the project is completed, and the type of construction (frame, masonry, combination, other = explain).

(c) Identify any billet designated quarters and indicate the billet for which it is designated.

(2) Repair and Improvement Projects. In project number sequence, enter the project number, a brief project description, the date (month and year) of completion or acceptance (contract completion date if ongoing), and the actual cost (award amount if ongoing) of all repairs and improvements completed during the past 5 years associated with the facility group involved. If none, enter the last major work performed in the same format. For all replacements and repairs of specific parts on equipment, show the date and cost of the last such replacement or repair regardless of when done. For instance, if a new furnace or roof is required, state the date and cost of the last replacement. For projects involving general officer quarters, the total operations cost and the total maintenance cost applicable to each unit for each of the past 5 years must also be shown.

(3) Proposed Method of Accomplishment.

(a) Identify the proposed method of accomplishment (station forces, contractor, combination).

(b) Determine if the proposed project is to be accomplished at one time. If not, explain. Improvement projects of a magnitude which will require funding in more than 1 year must include the complete phased plan indicating the scope of work, estimated cost (including escalation), and number of units included in each phase.

(4) Photographs. The submission of photographs in connection with projects is encouraged. Photographs should be included in project submissions to clearly illustrate the need to accomplish certain work. Photographs of unit exteriors showing facilities requiring changes, or the location of proposed additions, as well as interior pictures showing conditions to be corrected and he relationship with surrounding areas are most helpful for proper project evaluation. Good, clear photographs could mean the difference between routine approval and extended delay due to necessary clarification.

(5) Drawings. Each project should include drawings or sketches to scale which indicate the existing locations for the proposed work.

(6) Other. Provide other information necessary to evaluate a project, such as:

(a) For restoration projects, provide estimates for the replacement cost of the facility as well as the demolition expenses required if the project is not approved.

(b) For air-conditioning projects, identify the type of system to be installed and capacity in tons. Proposed air-conditioning systems must comply with the energy efficiency ratios contained in NAVFACINST 4100.5, Design Criteria Guidance for Energy Conservation.

(c) For conversion projects, provide the estimated cost of constructing new quarters for the proposed occupant and the economic advantages of accomplishing the proposed work. The method of analysis as defined and prescribed in NAVFAC P-442, Economic Analysis Handbook, should be used in determining the most advantageous alternative to satisfy the requirement. The results of the analysis should be submitted as supporting data with the project documents.

(d) For projects in foreign areas, indicate the international balance of payments (IBOP) data as required in enclosure (1) to NAVFACINST 11010.14.

(e) Provide other information considered appropriate.

(7) Remaining Repair or Improvement Work Required. Briefly identify other unapproved repair or improvement work required to all other facilities at the project site. If none, so state.

| 1. COMPONENT | FY 1990 MILITARY CONSTRUCTION PROJECT DATA | 2. DATE |
|---|---|---|
| Marine Corps | | 26 SEP 1989 |

| 3. INSTALLATION AND LOCATION | 4. PROJECT TITLE |
|---|---|
| Marine Corps Base, Anywhere | Repairs to 500 family housing units in Goodland Heights |

| 5. PROGRAM ELEMENT | 6. CATEGORY CODE | 7. PROJECT NUMBER | 8. PROJECT COST ($000) |
|---|---|---|---|
| | | AW-H-002-M2 | $3,232.8 |

9. COST ESTIMATES

| ITEM | U/M | QUANTITY | UNIT COST | COST ($000) |
|---|---|---|---|---|
| Replace Attic insulation | UN | 500 | 466 | 233.0 |
| Repair deteriorated roofs | UN | 500 | 2,982 | 1,491.0 |
| Replace furnaces | UN | 500 | 769 | 384.5 |
| Engineering Estimate | | | | 2,108.5 |
| Contractor's OH&P (25%) | | | | 527.1 |
| Subtotal | | | | 2,635.6 |
| Contingency (5%) | | | | 131.8 |
| Total Contract Cost | | | | 2,767.4 |
| SIOH (6% x Total Contr Cost) | | | | 166.1 |
| Design (6% x Total Contr Cost) | | | | 166.0 |
| Total Request (FY 89 Dollars) | | | | 3,099.5 |
| Total Request Escalated (FY 90 = *4.5%) | | | | 3,232.8 |

*figure used only for purpose of this example

10. DESCRIPTION OF PROPOSED CONSTRUCTION

This project encompasses all repairs required to officer and enlisted Capehard housing units in Goodland Heights: remove existing roofing, repair and replace decayed roof structures, cover with new roofing; replace settled attic insulation; and install new gas furnaces throughout.

11. REQUIREMENTS.

PROJECT: Correct deficiencies in insulation, roofs, and furnaces.

REQUIREMENTS: Roofs in the area are no longer weathertight. Insulation in the attics has settled and is not at original R-values. Original furnaces, now at the end of their useful lives, need replacing.

CURRENT SITUATION: Some structural damage has resulted from leaky roofs. Lack of adequate insulation is contributing to high utility bills. Service calls are increasing on furnaces which are 20 years old.

IMPACT IF NOT PROVIDED: Further delays in roof repair will accelerate structural decay and possibly damage personal belongings. Energy for heating the underinsulated units will continue to be wasted. Dollar savings will result if the attic insulation is installed at the time of the roof repairs. Furnace parts are increasingly difficult to find, making repairs time consuming and expensive. O&M costs would be reduced by installing energy efficient furnaces.

DD FORM 1 DEC 76 1391 PAGE NO

Figure H-1.--Completed DD Form 1391.

| 1. COMPONENT | FY 19 90 MILITARY CONSTRUCTION PROJECT DATA | 2. DATE |
|---|---|---|
| USMC | | 26 SEP 1989 |

3. INSTALLATION AND LOCATION
MCB ANYWHERE, ANYWHERE, US

| 4. PROJECT TITLE | 5. PROJECT NUMBER |
|---|---|
| Repairs to 500 family housing units in Goodland Heights | AW-H-002-M2 |

1. UNIT COMPOSITION AND BILLET DESIGNATION

a.

| Units | (Bldgs) | Bldg Type | (Stories) | BR | Baths | Rank | Cat Code |
|---|---|---|---|---|---|---|---|
| 120 | (60) | Duplex | (1) | 2 | 1 | Enl | 711-25 |
| 200 | (200) | Single | (1) | 3 | 1 | Enl | 711-25 |
| 80 | (80) | Single | (2) | 4 | 1½ | Enl | 711-25 |
| 30 | (30) | Single | (1) | 2 | 1½ | Off | 711-26 |
| 50 | (50) | Single | (1) | 3 | 1½ | Off | 711-26 |
| 20 | (20) | Single | (2) | 4 | 2 | Off | 711-26 |

b.

| Units | Yr Built | Acquired | Life | Type Construction |
|---|---|---|---|---|
| 400 | 1961 | FY 60 Capehart | 25 | Frame |
| 100 | 1962 | FY 60 Capehart | 25 | Frame w/ brk veneer |

c. N/A.

2. REPAIR AND IMPROVEMENT PROJECTS (last 5 yrs)

| Project No. | Description | Completed | Cost/Awd |
|---|---|---|---|
| HR-3-76 | Replace kitchen flooring (100 units) | 09/78 | $ 36,378 |
| HC-17-78 | Install dishwashers (500 units) | 07/79 | 106,412 |
| HR-10-79 | Replace 18 DHW heaters | 11/79 CCD | 17,500 |

This project will replace the original furnaces which are 20 years old.

3. PROPOSED METHOD OF ACCOMPLISHMENT

a. Contractor.
b. No increments.

4. PHOTOGRAPHS (see attached)

5. DRAWINGS (see attached)

6. OTHER N/A

7. REMAINING REPAIR & IMPROVEMENT WORK REQUIRED

| PROJECT NO. | Work Required | Est. Cost |
|---|---|---|
| AW-H-201-M2 | Replace boilers, kitchen counter tops (100 units) | $264.0K |
| AW-H-202-M2 | Re-Roof, Replace water lines, street lights | 831.4K |
| AW-H-301-M2 | Repair Housing Project Office, repair sidewalks, resurface streets | 62.5K |

DD FORM 1 DEC 76 1391c PREVIOUS EDITIONS MAY BE USED INTERNALLY UNTIL EXHAUSTED PAGE NO.

S/N 0102-LF-001-3915

Figure H-2.--Completed DD Form 1391c.

# APPENDIX I

## INSTRUCTION FOR COMPLETING NAVFAC FORM 1101317

1. Text Reference. See paragraphs 1812 and 1822.

2. General Information. The completed form NAVFAC 11013/7 (Cost Estimating Form) (see figure 1-10) provides a breakdown of the total estimated costs of a project request. Itemized cost estimates shall be sufficiently detailed to permit accurate determinations at the appropriate levels of approval authority, including the DOD level. The instructions below apply to all facility groups. ALL COSTS MUST BE SHOWN IN CONSTANT YEAR DOLLARS - DO NOT ESCALATE! Refer to figure E-1 for clarification.

3. Heading Blocks. Record the following:

a. INSTALLATION AND LOCATION. Enter the official name of the installation and location, city and state or city and country, as contained in the SNDL. Do not abbreviate. Use code name or designations only when necessary to preclude security classification or when an official name is not available.

b. PROJECT TITLE. Include the type of work being done; i.e., repair or improvement, the facilities involved, the name Of the housing site, and any other appropriate information.

c. IDENTIFICATION NUMBER. Each project will be assigned an identification number by the originating installation.

4. Other Heading Blocks. Complete the other blocks as appropriate. For repair or improvement projects, formulated under the whole-site concept, separate detailed forms are to be prepared indicating the costs to perform the work identified to each facility group. For projects involving improvements and repairs to be accomplished concurrently, a separate cost estimate is to be prepared showing the engineering estimate, in detail, for each portion of the facility group included in the project. Sizes and quantities will be stated for each item of material. Lump sum entries should be avoided. Materials and labor to accomplish each portion of the project will be listed at the price a contractor may be expected to pay. Do not include overhead and profit at this time. When these items are summed they will constitute the "engineering estimate." Support costs will then be included, in addition to the engineering estimate, and summed as follows.

5. Columnar Headings. For air-conditioning projects, include cost breakdowns as itemized. For other projects, record the following:

a. Item (or Feature) Description. Itemize standard components, or units, or project work and materials, or equipment. When applicable, include such units of work as excavation; concrete work, such as footings, slabs, structural, etc.; masonry, structural steel; rafters and trusses; roof sheathing; roofing; windows; doors; interior floors, such as asphalt and ceramic tile; wall construction, such as ceramic tile, plaster, plasterboard, etc.; exterior and interior painting; electrical wiring fixtures, outlets, and switches; plumbing

on a rough and fixture basis; heating, furnace and ducts, piping and radiators, and special equipment; removal of existing structural item; and installation of cabinets and shelving. For those items or components of work where one or two words fail to completely define the item, the description should be expanded so that the cost estimate can be evaluated and confirmed. For example, "door interior" should be further identified as to size, thickness, type, and material. When applicable, Federal specification numbers are acceptable.

b. Column 2. Quantities. No. of Units. Quantities of work units or components listed in column 1, consistent with sound engineering practice.

c. Column 3. Quantities, Unit. Standard abbreviations or symbols for units of measure listed in NAVFAC P-72 to describe the project component quantity recorded in column 2. Use "EA’ for each and "LS" for lump sum.

d. Columns 4 and 5. Material Costs. The cost per unit of the quantity in column 2 and the total material cost which is derived by multiplying the unit shown in column 4 by the number of units in column 2. The cost of Government-furnished materials (raw or fabricated form) is to be shown at procured costs. When a project is to be performed under contract, record reasonable costs of material to be paid by the contractor; and, if Government furnished material and equipment are to be used, identify each cost separately.

e. Columns 6 and 7, Labor Costs. The unit cost based on engineering estimate of manpower (installation labor forces and operators of equipment), and the total labor cost which is derived by multiplying the unit shown in column 6 by the number of units in column 2.

f. Columns 8 and 9, Engineering Estimates. The sum of the unit costs shown in columns 4 and 6 and the sum of the costs shown in column 5 and 7 for each item listed in column 1.

6. Engineering Estimate

a. Subtotals. Record the sum of the entries recorded in column 9.

b. Adjustment of Engineering Estimate. For projects to be performed by contract, apply to the "subtotal" cost recorded in column 9, the appropriate percentage factor (normally 25 percent) to allow for commercial expenses (contractor’s profit, overhead, insurance, taxes, social security, and the like), and add the result to obtain the "adjusted subtotal."

7. Total Project Cost. To the "subtotal" add the following:

a. The result obtained by applying a 5 percent factor for contingencies.

b. When applicable, fees for contractual architectural and engineering services (6 percent), as well as supervision, inspection, and overhead (SIOH).

NAVFAC 11013/7 (1-78)
Supersedes NAVDOCKS 2417 and 2417A

**COST ESTIMATE**

DATE PREPARED: 22 SEP 89

SHEET 1 OF 1

ACTIVITY AND LOCATION: Marine Corps Base, Anywhere
Anywhere, US

CONSTRUCTION CONTRACT NO:

IDENTIFICATION NUMBER:

ESTIMATED BY: John Smith

CATEGORY CODE NUMBER: 711-25, 711-26

PROJECT TITLE: Replace Furnaces, Repair Roofs, and Replace Insulation 500 Capehart Units

STATUS OF DESIGN: [X] PED [ ] 30% [ ] 100% [ ] FINAL [ ] Others(Specify)____

JOB ORDER NUMBER:

| ITEM DESCRIPTION | QUANTITY * | | MATERIAL COST | | LABOR COST | | ENGINEERING ESTIMATE | |
|---|---|---|---|---|---|---|---|---|
| | NUMBER | UNIT | UNIT COST | TOTAL | UNIT COST | TOTAL | UNIT COST | TOTAL |
| Patch & Replace Damaged Roof Rafters | 38 | B.F. | 0.47 | 17.86 | 0.31 | 11.78 | 0.78 | 30 |
| Replace Damaged Roof Sheathing | 81 | S.E. | 0.52 | 42.12 | 0.37 | 29.97 | 0.89 | 72 |
| New Flashing | 12 | L.F. | 1.04 | 12.48 | 1.01 | 12.12 | 2.05 | 25 |
| New Roofing | 28 | SQ. | 63.00 | 1,724.00 | ~~25.00~~ | 700.00 | 88.00 | 2,464 |
| Caulking | 172 | L.F. | 0.11 | 18.92 | 0.99 | 170.28 | 1.10 | 189 |
| Exterior Painting (touch-up) | 460 | S.F. | 0.05 | 23.00 | 0.39 | 179.40 | 0.44 | 202 |
| Furnace | 1 | EA. | 395.00 | 395.00 | 59.00 | 59.00 | 454.00 | 454 |
| Duct Work | 119 | lbs. | 0.56 | 67.00 | 2.08 | 248.00 | 2.65 | 315 |
| Attic Insulation | 1165 | S.E. | 0.18 | 209.70 | 0.22 | 256.30 | 0.40 | 466 |
| Engineering Estimate | | | | | | | | 4,217 |
| 500 units | | | | | | | | 2,108,500 |
| Contractor's OH&P | (25%) | | | | | | | 527,125 |
| Subtotal | | | | | | | | 2,635,625 |
| Contingency | (5%) | | | | | | | 131,781 |
| Total Contract Cost | | | | | | | | 2,767,406 |
| SIOH (6%) | | | | | | | | 166,045 |
| Design (6%) | | | | | | | | 166,045 |
| Total Request | | | | | | | | 3,099,496 |

S/N 0105 (F-010-1335)

* This hsg proj. has 100-4 br, 250-3 br, & 150-2 br units - these quantities represent a proj average

Figure I-1.--Cost Estimate for Dwellings.

# APPENDIX J

## INSTRUCTION FOR PREPARING THE FAMILY HOUSING REPAIR AND IMPROVEMENT PROJECT STATUS REPORT (REPORT SYMBOL MC-1l101-28)

1. Text Reference. See paragraphs 1820 and 1821.1

2. Format. Annual Family Housing Repair and Improvement Projects Status Report (Report Symbol MC-11101-28). The format for the report is contained in figure 1-4 and will be generated locally. The report is due to the CMC (LFF) by 31 October of each year.

a. Format. The Annual Family Housing Repair and Improvement Projects Status Report will be completed by each activity managing Marine Corps family housing assests. The report should identify all unfunded projects, and all funded-but-not-yet-reported-completed projects. The reports will begin with the fiscal year of the report and extend out to reflect all projects on the 6-year maintenance plan.

b. Column 1. Project Priority. List projects in order of priority.

c. Column 2. Program Year. Type "FY" and the last two digits of the fiscal year during which funding is desired. The fiscal year should be followed by a "C" if the project has been confirmed for a particular program, an "S" if the project has been identified as a straddle project, a "T" if the project has been tentatively identified for a particular program, or an "NP" (not programmed by HQMC) should be displayed if the project has not yet been programmed by HQMC.

d. Column 3. Project Number. Self-explanatory.

e. Column 4. Project Description. Brief description title beginning with the nature of the work and ending with the type of facility; i.e., "Repairs to Roofs, MOQ’s, Lyman Park."

f. Column 5. Number of Units. Enter the number of housing units involved in the projects.

g. Column 6. CWE. Current working estimate without SIOH or design costs. If the original CWE has been revised or changed, for whatever reason, since last reported, the new estimated cost should be entered and annotated as RCWE. A RCWE which revises the original CWE by plus or minus 25 percent will require new project documentation to include 1391, 1391c, and cost estimate.

h. Column 7, Award. If the project has been awarded, but not yet completed, enter award date and funded amount as follows: JAN 90/$650,000.

i. Column 8. Design Funds Required. Enter design A&E funds that are needed to design the subject project. If the project has already received design funds enter "NA".

j. Column 9. FY Design Required. Enter the fiscal year the design funds will be required.

k. Column 10. Obligated Design Amount. Enter the amount of the A&E award. If the A&E has not been awarded, indicate the month and fiscal year of the anticipated award date.

l. Column 11. Percent Designed. Enter the month and calendar year that the project is anticipated to be at 35 percent design completion and 100 percent completion as follows: "0590/1090" for 35 percent completion in May 1990 and 100 percent completion in October 1990.

m. Column 12. Remarks. Enter any applicable comments, to include date project was validated by HQMC and the validation score. If not validated, enter "not validated." Validation date and score is only necessary if project has yet to be programmed. If project was completed during the last fiscal year, enter date the project was completed and the final project cost. Once a project has been completed and reported as such, it need not appear on the next annual report. Show all change orders awarded for M-2 and R-2 projects. List individually by number, showing cost and brief description, plus whether in-scope or out of scope. Show any related M-2 or R-2 projects which are to be accomplished concurrently.

# APPENDIX K

## CONDITION OF OCCUPANCY FORM FOR BACHELOR HOUSING

1. Text Reference. See paragraph 2003.2.

2. Occupancy. _____ is assigned to _____ to be occupied as military bachelor housing of the United States on _____.
(date)

3. Occupant Use. The occupants shall use the premises solely as a single or dual residence, as applicable, for themselves. Use of the unit for any other purpose, including the shelter of any additional number of persons is prohibited without prior written consent of the housing authority.

4. Good Repair. Except as otherwise provided herein, the housing authority shall maintain the property in good repair and habitable condition and shall be responsible for all repairs not due to the abuse or negligence of the occupant, or their guests during occupancy.

5. Pets. Pets are not allowed on the premises. Damage caused by noncompliance will be your responsibility.

6. Condition of Property. The housing authority and the occupant(s) will inspect the property, and both parties will agree that the property is in a fit and habitable condition. Any discrepancy items noted by the occupant(s) shall be submitted in writing and received by the housing authority generally within 15 days of occupancy. If discrepancies are not received by the housing authority within the 15-day period, the housing authority should consider the property to be in acceptable condition and suitable for occupancy.

7. Plumbing and Appliances. The occupant(s) shall keep the premises, including all plumbing fixtures, facilities, and appliances as clean and safe as condition permits. At the termination of occupancy, all appliances and equipment shall be in good working order and the premises shall be in a clean condition, normal wear, and tear excepted.

8. Use and Repair of Facilities. The occupant(s) shall use all fixtures, facilities, and appliances in or on the premises in a reasonable manner. Any damage caused by either the occupants, or guests, beyond normal wear and tear, shall be repaired at the occupant’s expense.

9. Damaging Property. If the occupant willfully or negligently destroys, defaces, damages, impairs, or removes any part of the premises (including fixtures, facilities, and appliances) or willfully or negligently permits any person to do so, the occupant shall be held responsible for the damages.

10. Notice of Defects or Malfunction. The occupant shall promptly notify the billeting NCO whenever the structure, equipment, or any fixture contained therein becomes defective, broken, damaged, or malfunctions in any way.

11. Occupant Conduct. Occupants shall conduct themselves in a manner that will not disturb their neighbors.

12. Health and Safety. The occupant shall comply with all health and safety regulations imposed by the local command.

13. Smoke Detectors. It is the responsibility of the occupant and the housing authority to check smoke detectors periodically during occupancy and replace batteries as necessary to keep the smoke detectors in proper working condition and to report any malfunctions to the billeting NCO.

l4. Insurance. It is recommended that the bachelor housing occupant who may be held liable for damage or loss to the bachelor housing unit equipment or furnishings, obtain a comprehensive insurance policy which provides for protection of their personal property and the unit to which they are assigned.

15. Redecorating and Alterations. The occupant shall obtain written consent from the housing authority before redecorating or making any alterations.

16. Periods of Absence. The occupant shall notify the billeting NCO whenever extended absences from quarters are anticipated.

17. Access to Property by the Housing Managers and their Duly Designated Representatives. Upon reasonable notice to the occupant and at reasonable times, the housing authority or a duly designated representative may enter the premises to: (a) inspect the property; (b) make necessary repairs, alterations, or improvements; and (c) supply necessary or agreed upon services.

18. Neglect and Costs. If at any time during the term of this occupancy, the housing authority is required to make repairs to the property or its equipment for damages caused by the abuse or negligence of the occupant or the occupant’s guests, the occupant understands that the repairs shall be made at the occupant’s expense.

I HAVE READ, AND UNDERSTAND ALL OF THE CONDITIONS CONTAINED HEREIN.

| | | | |
|---|---|---|---|
| _____ | | _____ | |
| Sponsor | Date | Housing Representative | Date |

# APPENDIX L

## BACHELOR HOUSING REQUIREMENTS ESTIMATE

1. Text Reference. See paragraphs 2100 and 2201.9.

2. Introduction. Tab (A) is a sample Bachelor Housing Requirements Estimate (BHRE). An installation specific form will be forwarded to each installation commander annually with the Facilities Support Requirements (FSR) document for review and comments. Upon completion of the validation process described below, the annotated BHRE and the installation commander's comments must be returned to the CMC (LFF-3) for final reconciliation within 30 days of its receipt by the activity. The validated BHRE will provide up to date information for Congressional testimony in support of the planning, programming, and budgeting cycle for the Military Construction Program. This report is exempt from reports control.

3. Unit Listing. The first section of the BHRE, page one of Tab (A), is a MCC/RUC listing of the units presently residing aboard your installation. Please review this section to ensure that no units are omitted and annotate units that should be deleted. Ensure that the MCC/RUC agree with the corresponding unit name. The personnel figures in this section are extracted from the MMS data base and should be accurate. There is no need to comment on these figures unless you detect what you consider to be gross errors.

4. FSR Multiplier. This section of the BHRE calculates an FSR multiplier for your installation based on a comparison of your current total on-board strength to your projected strength. An FSR multiplier greater than one predicts growth, and an FSR multiplier less than one predicts strength reductions, assuming that the current base loading figure is reasonably accurate.

5. Basic Facilities Requirements. This section calculates your projected strength by rank groups. The average daily transient population figure is taken from historical data on file at this Headquarters. If your transient population has changed, or is projected to change, please include revised data in your comments. Page 3 of Tab (A) may be used as a worksheet to develop your transient population estimate. All enlisted students (less recruits) should also be added to your transient totals. Recruit population figures should be reported in the appropriate space in note (4).

6. Assets. This section shows your current bachelor housing assets by rank group. On-base assets information is extracted from the same data base that produces the Facilities Planning Document (FPD). Please compare this section with your FPD and report any errors or omissions. Add all Navy/other service bachelor housing assets located aboard your installation, in the space provided.

a. The off-base assets section assumes that we will program construction to accommodate all bachelor sergeants and below. The number of officers and staff NCO's living off base is extracted from the MMS data base and assumes that all are adequately housed. If that assumption is not valid at your installation, please provide revised data and justification in your comments.

b. Installations involved in recruit training or entry level follow-on training should report their adequate open bay assets in the appropriate space in note (5).

c. It is our goal to eventually replace all Marine Corps BEQ's that do not meet current BEQ construction criteria. Accordingly, we will classify any room configured BEQ with central bath facilities as "inadequate" for requirements estimation process. However, do not confuse new construction criteria with the "minimum standards of adequacy" for quarters assignment purposes that are found in chapter 2 of this Manual. Room configured BEQ's with central bath (i.e., gang head) are still adequate quarters (for assignment purposes) for corporals and below. To assist in making adequacy determinations, the general notes of the FPD should be annotated with a brief description of each BEQ, to include the number of rooms in each building. For example: wood frame, open bay, central bath; concrete, 80 rooms at 200 sqft, central bath; brick, 20 rooms at 180 sqft, 30 rooms at 265 sqft, 10 rooms at 360 sqft, private bath; or quonset, open bay, detached central bath. If your inventory includes a building with a variety of odd sized rooms, report them in increments of 90 sqft, (i.e., less than 90 sqft, 91 to 179 sqft, 180 to 269 sqft, etc.).

7. Construction (MCON). This section shows the total bachelor housing HILCON program, under contract, approved by Congress and proposed in the Six-Year Development Plan, for your installation. Please review this section and report any errors or omissions.

8. Deficit. The final section calculates your projected bachelor housing requirements deficit by subtracting current assets and your MILCON program from your projected strength. Include in your comments any special considerations at your installation that would warrant programming of bachelor housing construction beyond elimination of the deficit on your BHRE.

9. Summary. After the installation commander's comments have been considered and the final reconciliation of the BHRE is completed, each installation commander will be provided with a copy of the final BHRE. The remarks section of the BHRE summary identifies actions that must be taken by the installation commander to eventually achieve a balance between bachelor housing requirements and bachelor housing assets. At those activities where construction must be programmed to satisfy the bachelor housing requirement, the installation commander has the latitude to set priorities based on the condition of his existing bachelor housing assets. Bachelor housing projects must compete on their own merits within the installation commander's overall construction plan.

## BACHELOR HOUSING REQUIREMENTS ESTIMATE FOR MCAS BEAUFORT

| MCC | RUC | UNIT NAME | ENL TOTAL | BACHELOR ENLISTED E1-4 | E5 | E6-9 | ENL% BACH | OFF TOTAL | BACHELOR OFF W1-02 | 03-10 | OFF% BACH |
|---|---|---|---|---|---|---|---|---|---|---|---|
| G88 | 02031 | HQHQRON, MCAS BFT SC | 28 | 0 | 0 | 1 | .04 | 0 | 0 | 0 | .00 |
| VF1 | 01115 | VMFA 115 MAG 31 | 129 | 46 | 10 | 1 | .44 | 22 | 1 | 1 | .09 |
| VF2 | 01122 | VMA 122 MAG-31 | 130 | 46 | 2 | 10 | .45 | 22 | 0 | 1 | .05 |
| VF3 | 01251 | VMFA 251 MAG-31 | 131 | 42 | 5 | 3 | .38 | 20 | 2 | 5 | .35 |
| VF5 | 01333 | VMFA 333 MAG-31 | 136 | 45 | 8 | 7 | .44 | 21 | 0 | 0 | .00 |
| VF6 | 01451 | VMFA 451 MAG-31 | 152 | 53 | 13 | 6 | .47 | 21 | 0 | 2 | .10 |
| 026 | 02031 | HQHQRON, MCAS BFT SC | 351 | 83 | 11 | 12 | .30 | 52 | 4 | 5 | .17 |
| IEO | 27140 | COMBAT SERVICE SUPPORT DE | 86 | 29 | 4 | 0 | .38 | 4 | 0 | 0 | .00 |
| IJJ | 00031 | MAG-31 2DMAW MCAS BFT | 93 | 30 | 4 | 1 | .38 | 23 | 1 | 2 | .13 |
| 165 | 00273 | MWSS 273 MWSG 27 | 551 | 243 | 11 | 4 | .47 | 20 | 2 | 2 | .20 |
| | 00972 | MCAS 5 MACG 28 2DMAW MCAS BFT SC | 215 | 87 | 8 | 11 | .49 | 32 | 8 | 1 | .28 |
| | 01086 | HMS 31 MAG-31 2DMAW MCAS BFT SC | 2 | 0 | 0 | 0 | .00 | 0 | 0 | 0 | .00 |
| | 01296 | MATCS 28 DET A MCAS BFT SC | 17 | 10 | 0 | 1 | .65 | 3 | 0 | 0 | .00 |
| | 05101 | SU 6 MWHS 2DMAW TME 23 PERM PERS | 4 | 1 | 0 | 0 | .25 | 2 | 0 | 1 | .50 |
| | CURRENT TOTAL FOR MCAS BEAUFORT | | 2,025 | 715 | 76 | 57 | .42 | 242 | 18 | 20 | .16 |

TAB A
PAGE 1 OF 3

BACHELOR HOUSING REQUIREMENTS ESTIMATE RECAP FOR: MCAS BEAUFORT UPDATED: 16 JAN 1990
FSR PROJECTED BASE LOADING (BACHELOR + MARRIED) divided by CURRENT BASE LOADING (BACHELOR + MARRIED) equals FSR MULTIPLIER
Report Control Symbol: Exempt

| | | | | | |
|---|---|---|---|---|---|
| ENLISTED | 2508 | / | 2025 | - | 1.238619 |
| OFFICER | 303 | / | 242 | - | 1.252066 |

| BASIC FAC REQ(BFR) | CURRENT | FSR MULTIPLIER | PROJ(BASE) | TRANSIENT | PROJ REQ(PN) |
|---|---|---|---|---|---|
| CPL - PVT | 715 | 1.238519 | 886 | 247 | 1133 |
| SGT | 76 | 1.238519 | 94 | 35 | 129 |
| SNCO's | 57 | 1.238519 | 71 | 31 | 102 |
| TOT BEQ REQ | 848 | | 1051 | 313 | 1364 |
| MAN-SPACE EQUIVALENT | 1096 | | 1358 | 441 | 1799 |
| WO-1 - 1STLT | 18 | 1.252066 | 23 | 10 | 33 |
| CAPT - GEN | 20 | 1.252066 | 25 | 19 | 44 |
| TOT BOQ REQ | 38 | | 48 | 29 | 77 |

| | | OFF BASE | ADEQUATE (BASE) | MCON (BASE) | TOTAL ASSETS (PN) |
|---|---|---|---|---|---|
| CPL - PVT | (C721.11 ASSETS) | 0 | 66 | 0 | 66 |
| SGT | (C721.12 ASSETS) | 0 | 135 | 0 | 135 |
| SNCO's | (C721.13 ASSETS) | 13 | 68 | 0 | 81 |
| TOT BEQ ASSETS | | 13 | 269 | 0 | 282 |
| MAN-SPACE EQUIVALENT | | 52 | 472 | 0 | 524 |
| WO-1 - 1STLT | (C724.11 ASSETS) | 9 | 65 | 0 | 74 |
| CAPT - GEN | (C724.12 ASSETS) | 13 | 55 | 0 | 68 |
| TOT BOQ ASSETS | | 22 | 120 | 0 | 142 |

| | | CONTRACTED (1) | APPROVED (2) | PROPOSED (3) | TOTAL (PN) |
|---|---|---|---|---|---|
| CPL - PVT | (C721.11 MILCON) | 0 | 264 | 528 | 792 |
| SGT | (C721.12 MILCON) | 0 | 48 | 96 | 144 |
| SNCO's | (C721.13 MILCON) | 0 | 4 | 32 | 36 |
| TOT BEQ MCON | | 0 | 316 | 656 | 972 |
| MAN-SPACE EQUIVALENT | | 0 | 376 | 848 | 1224 |
| WO-1 - 1STLT | (C724.11 MILCON) | 0 | 0 | 0 | 0 |
| CAPT - GEN | (C724.12 MILCON) | 0 | 0 | 0 | 0 |
| TOT BOQ MCON | | 0 | 0 | 0 | 0 |

NOTES:

(1)

(2) P-366 FY91 264/ 48/ 4 (372 MS)
(3) P-368 FY92 264/ 48/ 1 (364 MS) P-369 FY93 264/ 48/30 (480 MS)
(4) RECRUIT REQUIREMENT: ASSETS: DEFICIT: (C721.15)

SIGNATURE OF REVIEWER:_____

DATE:_____ AUTOVON:_____

DEFICITS BY RANK GROUPS IN PERSONS

| | |
|---|---|
| CPL-PVT (C721.11) | 275 |
| SGT (C721.12) | -150 |
| SNCO's (C721.13) | -15 |
| TOT BEQ DEFICIT | 110 |
| MAN-SPACE EQUIVALENT | 51 |
| WO-1STLT (C724.11) | -41 |
| CAPT-GEN (C724.12) | -24 |

TAB A
PAGE 2 OF 3

## BHRE TRANSIENT POPULATION WORKSHEET

ACTIVITY: _____ DATE OF ESTIMATE: _____

1. Reported figures should reflect a daily average. While this is an estimating tool and not a strict accounting, numbers must be supportable by documents such as school schedules, morning reports, and billeting office utilization records. No more time should be spent than is necessary to provide a reasonable and supportable estimate.

a. FSR TRANSIENT LINE. Most FSR's have a "Transients" line. Report the estimated rank distribution for these transients based on local experience.

b. STUDENTS. The FSR lists students by school with no distinction between PCS "permanent party" students and TAD "transient" students. On this line, provide an estimated rank distribution for TAD "transient" students only. Use a separate line for each school. MCRD's do not include recruits here.

c. OTHER. Report miscellaneous transients on this line.

| TYPE TRANSIENT | CPL-PVT | SGT's | SNCO's | WO-LT | CAPT-GEN |
|---|---|---|---|---|---|
| FSR TRANSIENTS | | | | | |
| STUDENTS | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| OTHERS | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| TOTALS | | | | | |

# APPENDIX M

## INSTRUCTIONS FOR COMPLETING THE BACHELOR HOUSING INVENTORY AND UTILIZATION DATA (BHIUD) WORKSHEET

1. Text Reference. See paragraph 2100.

2. General Instructions. The CMC (LFF) annually compiles and submits the information provided on this worksheet to the DoD. Commands are authorized to reproduce the BHIUD locally. Marine Corps Report Control Symbol DD-11103-01 (external RCS DD-P&L (A)1470) has been assigned to this report.

a. Installations will complete the worksheet and return the original and one copy to the CMC (LFF-3) by 1 November annually.

b. Installations with subcamps (MCB's, Camp S. D. Butler, Camp Lejeune, and Camp Pendleton) will complete a consolidated worksheet for their entire base, and a separate worksheet for each subcamp; e.g., Camp Courtney is a "subcamp' of MCB, Camp S. D. Butler.

3. Line Item Instructions. Lines 2-11. Standard data, fill in as appropriate.

4. Permanent Personnel

a. Line 12, Spaces.

b. Line 12 (a-c). List all individual room spaces in increments of 90 square feet of net living area with a maximum space count of four; include diverted and inactive spaces.

c. Line 12 (aa-cc). List all squad bay spaces in increments of 72 square feet of net living area; include diverted and inactive spaces.

d. Line 12 (d-f). List all officer quarters. See figure 2-1 of this Manual for MSA; include diverted and inactive spaces.

e. Line 13. Diverted Space. Billeting space being used for any purpose other than bachelor housing, or spaces that are inactive.

f. Line 14. Net Spaces. Line 12 minus line 13.

g. Line 15. Maximum Occupant Capacity (By Rank).

(1) Enlisted. The maximum number of enlisted personnel who could be housed in enlisted net spaces, based on allocation of spaces to enlisted grade categories, and occupancy standards in figure 2-1 of this Manual.

(a) Allocation of enlisted rooms, for purposes of this report.

1 Occupied Rooms. Each fully or partially occupied room is allocated to the grade category of the senior (or only) occupant, including any vacant portion of the room.

2 Vacant Rooms. Rooms with no occupants are allocated to the grade category for which designated. If not designated, they are allocated to E-l/E-4.

(b) Occupant capacity of open squad bays. Net spaces included on line 14.

(c) Occupant capacity of enlisted rooms (excluding diverted rooms).

1 Determine the occupant capacity of each room as follows:

| | OCCUPANT CAPACITY OF ROOM | | |
|---|---|---|---|
| GRADE ALLOCATION OF ROOM | E-1-E-4 | E-5 | E-6-E-9 |
| Room under 180 sqft (one space) | l | 1 | .5 |
| Room 180-269 sqft (two spaces) | 2 | l | .5 |
| Room 270-359 sqft (three spaces) | 3 | 2 | 1 |
| Room 360 sQft or greater (four spaces) | 4 | 2 | 1 |

2 Add the occupant capacities of all rooms.

(2) Officers. Same as line 14.

(a) Line 16. Personnel Actually Housed. Permanent personnel residing in (or assigned to) bachelor quarters. If the grade of the occupant and the space do not match, tabulate and report by occupant grade; e.g., an enlisted occupant residing in officer quarters shall be reported in the enlisted column. Do not report any transient personnel here, but rather, on line 22.

(b) Line 17. Utilization Percent. Divide line 16 by line 15 and express as a percentage.

5. Transient Personnel

a. Line 18. Spaces. Report all transient spaces including diverted and inactive spaces.

b. Line 18 (a)-(c), Enlisted Spaces for Individual Rooms. Increments of 90-square feet of net living area. The maximum count in any room is four; there is no prescribed person-limit in open squad bays if the necessary square footage is present; include enlisted permanent personnel who are not recruits or trainees.

c. Line 18 (aa)-(cc). Enlisted Spaces for Open Squad Bays for Recruits or Trainees. Increments of 72-square feet of net living area.

d. Line 18 (d)-(f). Officer Spaces. All officer transient quarters rooms or suites, including diverted or inactive units.

e. Line 19. Diverted Spaces. Billeting spaces being used for any purpose other than bachelor housing, or spaces that are inactive.

f. Line 20. Net Spaces. Line 18 minus line 19.

g. Line 21. Maximum Occupant Capacity.

(1) Enlisted. The maximum number of transient enlisted personnel who could be housed in enlisted net spaces, based on allocation of transient quarters to enlisted grade categories, and occupancy standards in figure 2-1 of this Manual. Line 21 equals the total of the following:

(a) Rooms occupied by E-6-E-9.

(b) Vacant rooms designated for E-6-E-9 (excluding diverted and inactive rooms).

(c) Net spaces (increments of 90-square feet included on line 20) in rooms not occupied by, nor vacant and designated for E-6-E-9.

(d) Net spaces in open squad bays (included on line 20).

(2) Officers. Same as line 20.

(a) Line 22. Personnel Actually Housed. Transient personnel (excluding accompanying dependents) occupying transient quarters. Include transient personnel occupying permanent bachelor quarters.

(b) Line 23. Utilization Percent. Divide line 22 by line 21, and express as a percentage.

6. Supplemental Data

a. Lines 24-28. Data pertaining to permanent personnel shall be tabulated as of 30 September. Data pertaining to transient personnel shall be a daily average; enter as whole numbers.

b. Line 24 and 25. Self-explanatory.

c. Line 26(a). Bachelors Off-Base with BAQ. Single personnel residing off-base and receiving BAQ at the "without-dependents" rate.

d. Line 26(b). Per Diem. The average daily number of certificates of nonavailability issued.

e. Line 27. Bachelors E-1-E-5 Living Off Base With BAQ at the "Without-Dependents" Rate (Own Right). Single E-1-E-5 personnel living off base and receiving BAQ at the "without-dependents" rate.

f. Line 28. Bachelors E-1-E-5 Living Off Base Without BAQ But Maintaining Assigned On-Base Quarters. Single E-1-E-5 personnel without dependents, living off base, not receiving BAQ at the "without-dependents’ rate, for whom adequate Government quarters are assigned or available.

WORKSHEET FOR DD FORM 2085 (BACHELOR HOUSING INVENTORY AND UTILIZATION DATA)

HQMC LFF-3 A/V 226-0860/0864

A1..X41

1. REPORT CONTROL SYMBOL: DD-11103-01 2. INSTALLATION NAME: _____ 3. REPORT DATE: OCTOBER 1, 19__ - SEPTEMBER 30, 19__ 4. RPIC: _____ 5. STATE: _____

6. ZIP CODE: _____ 7. COUNTRY: _____ 8. MAJOR COMMAND/CLAIMANT: USMC 9. DOD COMPONENT: USMC

10. AREA: _____ 11. TYPE REPORT: INDIVIDUAL ___ SUMMARY ___

| | ENLISTED ADEQUATE INDIVID ROOMS (a) | ENLISTED SUBSTD INDIVID ROOMS (b) | ENLISTED TOTAL INDIVID ROOMS (c) | ENLISTED ADEQUATE SQUAD BAYS (aa) | ENLISTED SUBSTD SQUAD BAYS (bb) | ENLISTED TOTAL SQUAD BAYS (cc) | OFFICER ADEQUATE (d) | OFFICER SUBSTD (e) | OFFICER TOTAL (f) |
|---|---|---|---|---|---|---|---|---|---|
| PERMANENT PERSONNEL | | | | | | | | | |
| 12. SPACES: a) INDIVIDUAL ROOMS at 90 square feet for ENLISTED | _____ | _____ | _____ | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | | | _____ | _____ | _____ |
| b) OPEN SQUAD BAYS at 72 square feet for recruits/trainees | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | | | _____ | _____ | _____ | XXXXXXXXX | XXXXXXXXX | XXXXXXXXX |
| 13. DIVERTED SPACES | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| 14. NET SPACES (line 12 less line 13) | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| 15. MAXIMUM OCCUPANT CAPACITY (by rank) | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| 16. PERSONNEL ACTUALLY HOUSED | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| 17. UTILIZATION % (line 16 divided by line 15) | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| TRANSIENTS (official duty personnel on TAD ORDERS) | | | | | | | | | |
| 18. SPACES | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| 19. DIVERTED SPACES | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| 20. NET SPACES (line 18 less line 19) | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| 21. MAXIMUM OCCUPANT CAPACITY | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| 22. PERSONNEL ACTUALLY HOUSED | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| 23. UTILIZATION % (line 22 divided by line 21) | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |

| SUPPLEMENTAL DATA | PERMANENT PERSONNEL ENLISTED (a) | PERMANENT PERSONNEL OFFICER (b) | TRANSIENT PERSONNEL ENLISTED (c) | TRANSIENT PERSONNEL OFFICER (d) |
|---|---|---|---|---|
| 24. (a) GEOGRAPHICAL BACHELORS | _____ | _____ | XXXXXXXXXXX | XXXXXXXXX |
| (b) NON DUTY PERSONNEL ON-BASE | XXXXXXXXXXX | XXXXXXXXX | _____ | _____ |
| 25. (a) IN LEASED BACHELOR QUARTERS | _____ | _____ | XXXXXXXXXXX | XXXXXXXXX |
| (b) CONTRACT QUARTERS | XXXXXXXXXXX | XXXXXXXXX | _____ | _____ |
| 26. (a) BACHELORS OFF-BASE WITH BAQ | _____ | _____ | XXXXXXXXXXX | XXXXXXXXX |
| (b) PER DIEM (daily average number of Certificates of N/A) | XXXXXXXXXXX | XXXXXXXXX | _____ | _____ |
| 27. BACHELORS PVT-SGT LIVING OFF BASE WITH BAQ AT THE | _____ | _____ | XXXXXXXXXXX | XXXXXXXXX |
| "WITHOUT-DEPENDENTS" RATE (own-right) | | XXXXXXXXX | XXXXXXXXXXX | XXXXXXXXX |
| 28. BACHELORS PVT-SGT LIVING OFF BASE WITHOUT BAQ BUT MAINTAINING | _____ | _____ | XXXXXXXXXXX | XXXXXXXXX |
| ASSIGNED ON-BASE QUARTERS | | XXXXXXXXX | XXXXXXXXXXX | XXXXXXXXX |

Signature of preparer: _____ autovon: _____ Date: _____

# APPENDIX N

## MARINE CORPS INNKEEPER AWARD PROGRAM
## SAMPLE NOMINATION, WITH INSTRUCTIONS

1. Text Reference. See paragraph 2201.5q.

2. General Information. The annual Innkeeper Award recognizes the outstanding efforts and accomplishments of people who operate and maintain transient quarters throughout the Marine Corps and encourages installations to improve transient facilities' amenities, furnishings, and services. The objectives of this award are outlined in paragraph 8 of this appendix.

3. Description. The award for installation excellence in transient billeting operations is a plaque inscribed with the name of the winning installation. It will be presented for permanent retention to the commander of the installation.

4. Eligibility. All installations operating transient quarters are eligible. An installation may not claim the award for 2 consecutive years.

5. Nominations. Commands are encouraged to compete for the award by submitting nominations as outlined in paragraph 9 of this appendix.

6. Selection Procedures. The Innkeeper Award Review Committee will consist of five persons selected from the Installations and Logistics Department (LF) by the CMC. A representative appointed by the Innkeeper Award Review Committee will visit the top three finalists for an on-site evaluation. The Innkeeper Award Review Committee will recommend one installation for the award to the CMC.

7. Point of Contact. For further information concerning the Innkeeper Award contact the CMC (LFF-3), AUTOVON 226-0864/0860.

8. The United States Marine Corps Innkeeper Award proposes to highlight outstanding installation achievements for imaginative and innovative management actions that have increased the productivity of the installation's transient billeting program. The award is intended to:

a. Recognize the leaders, managers, and employees who have made the most outstanding contribution to increased productivity, quality, and efficiency of management in providing transient billeting.

b. Encourage competition to increase the standards of transient billeting.

c. Promote ways to improve organization, procedures, functions, and policies.

d. Motivate people to advance new ideas for innovative management and improvements of transient facilities.

e. Stimulate initiatives to improve morale and productivity through improved quality of life for all installation personnel.

NOMINATION PROCEDURES

9. General Information

a. The award will cover the fiscal year (FY) beginning l October and ending 30 September.

b. Commands are to compete for this award by naval letter submission.

Subject: Nomination for FY __ United States Marine Corps Innkeeper Award--(Name of Command).

c. Nomination package must be unclassified.

d. Entries must be received by the CMC (LFF), Washington, DC 20380-0001, by 31 July each year.

10. Contents of Nomination Package

a. Entries should include the following:

(1) Complete designation of installation and its location.

(2) Names and titles of specific individuals closely related to award nomination; at a minimum, the major staff/action officers, and the installation commander.

(3) Photographs; i.e., pictures of both types of transient facility (officer and enlisted), desk administration area, innovative ideas, each in 8 inch by 10 inch glossy color print format.

(4) Draft press release; one page only.

(5) Description of innovative ideas, programs, and specific evidence of effectiveness.

(6) Utilization rate of transient quarters during the fiscal year. Rates will be broken out by type of transient quarters.

(7) Total number of personnel using transient quarters during the fiscal year. This should include the number for each type of transient quarters.

(8) Total nonappropriated and appropriated funds budgeted for the fiscal year for each type of transient operations support.

(9) Use/control of transient quarters.

(10) Long-term upgrade and replacement of furnishings in each type of transient facilities.

(11) General housekeeping quality control procedures.

(12) Personal services items provided the occupant, for each transient quarters.

(13) Registration process of guests.

(14) Reservation system control.

(15) Courtesy/customer relations program.

(16) Amenities. (As found in transient quarters.)

(17) Facility Management program:

(a) Landscaping.

(b) Registration parking area.

(c) Allocation of assets.

(d) Energy conservation.

(e) Maintenance procedures.

b. Narrative Guidance. In narrative form, describe the installation's accomplishments for the reporting period. Narrative should include innovative management actions resulting in increased productivity and/or improvements in quality of life, tangible results, and mission impact. The evaluation record is located at the end of this appendix. The text should focus on management actions taken to improve quality-of-life standards, motivation, and efficient use of resources to accomplish the mission.

11. USMC Innkeeper Award Checklist

AREA I

CATEGORY A - MANAGEMENT

1. Commander's Support

a. Appropriated fund budget support.

b. Commander's quarterly inspections.

c. Use, control, and occupancy rate of transient quarters.

2. Adequate Supervision and Response

a. Management structure.

b. Delegation of responsibilities.

3. Effective Utilization of Manpower. Allocation of manpower based on workload (rooms per housekeeper, etc.).

4. Upgrade Program

a. Utilization of appropriated and nonappropriated funds (NAF's).

b. Long-term upgrade and replacement of furnishings.

5. Operating Procedures and Policies

a. Effectiveness and adequacy of operating instructions. Has a cash control operating instruction been developed? Is it being followed?

b. Are operating instructions comprehensive?

c. Are employees knowledgeable of instructions and do they use the instructions?

d. Do policies in effect conform with Marine Corps guidelines?

CATEGORY B - HOUSEKEEPING

1. General housekeeping in transient quarters.

a. Dusting.

b. Wastebasket clean and empty.

c. Windows and sills.

d. Floors and carpeting.

e. Walls and ceilings.

f. Vents clean.

g. Polishing.

h. Refrigerators.

i. Fixtures are clean, adequately secured, and operative.

2. Bathroom

a. Bathroom clean (floor, walls, etc.).

b. No soap build-up/residue.

c. No evidence of mold/mildew.

d. Shower curtain/door is in good condition.

e. Toilet clean.

3. Procedures

a. Is a checklist used by housekeepers?

b. Is cleaning methodical?

c. Are carts available and effectively used by maids?

4. Quality Control

a. Are inspections by billeting director recorded?

b. Are inspections by senior housekeepers recorded?

c. Are carts available and effectively used by maids?

d. Do housekeeping aides check operation of lights, water, plumbing, refrigerators, TV's, windows, air-conditioning, heat, and ventilators?

e. Are management inspection policies and procedures followed?

5. Personal Services Items Available

a. Soap bars.

b. Towels (2) and washcloths.

c. Cups (hot and cold).

d. Facial tissue; e.g., Kleenex.

e. Toilet tissue. (Are extra rolls available?)

f. Shoeshine cloth.

g. Cloth bathmat.

CATEGORY C - DESK ADMINISTRATION

1. Appearance/Function

a. Pleasant lobby arrangement and decor.

b. Secured area for luggage.

c. Desk proper height for customers to fill out forms and desk free of obstacles.

d. Sundry items displayed and have easy access.

e. Minimum number of signs (not cluttered).

f. Wake-up service.

2. Registration Process

a. Using established form.

b. Key-board/rack - functional, convenient.

c. Keyring - identifies room/building indirectly.

d. Stamp available for civilian use of exchange, etc.

3. Reservation System

a. Using established form.

b. Check-in/out procedures.

c. Reservations are easily identified at check-in.

d. Effective use of contract quarters and nonavailability certificates. (Are they logged and secured?)

4. Funds Handling

a. Sufficient change fund. Commander’s letter on file?

b. Transfer of funds at shift changes recorded? Does the process of transferring change funds, receipts, and accountable documents provide for signature of receiving individual? Is there accountability throughout?

c. Are night depositories used to deposit receipts after hours when cash exceeds the fund storage limits? Is commander’s letter on file? Have security escorts been used?

d. Safe procedures.

e. Inventory procedures.

f. Are funds secured (register closed and locked) when the cashier leaves the desk’s immediate area?

g. Has the manager performed a surprise cash count within the last 60 days?

h. Have employees been briefed on procedures to follow during and after a robbery?

i. Are register read/reset keys controlled?

j. Are checks endorsed "for deposit only" immediately upon receipt?

k. Is there a separation of duties between cashiers and those persons involved in reconciling accounts receivable?

5. Courtesy/Customer Relations

a. Handout information available at desk.

(1) Kennel list.

(2) Motel list.

(3) Base and local maps.

(4) Dining facilities list.

(5) Child care facilities.

(6) Local transportation.

(7) Recreation facilities.

b. Attitude towards guests.

c. Box for suggestion/comment forms. (Are replies used?)

d. Checkout items.

(1) Iron/ironing board.

(2) Luggage carrier.

(3) Bedboard.

e. Desk clerks knowledgeable of local area.

CATEGORY D - FURNISHINGS

1. Adequacy

a. Full size beds for single room (double/queen/king).

b. Nightstand with clock-radio and lamp.

c. Chest of drawers.

d. Luggage rack.

e. Full-length mirror.

f. Chairs.

g. TV (color or back and white? Are knobs missing? Is a TV channel listing provided?)

h. Desk with desk chair.

i. Draperies (color coordinated).

j. Pictures/wall art.

k. Bedspreads (color coordinated).

l. Carpeting (color coordinated).

2. Maintenance

a. Handles, chips, dents, etc., repaired.

b. Upholstery shampooed.

c. Drapes cleaned and in good working order.

3. Pleasing Atmosphere. Furniture/carpet/drapes/wallS match (color coordinated).

4. Improvement Plans

a. Written plans to improve room decor and adequacy.

b. Consider appropriated and NAF’s (double budget).

c. Long-term; e.g., replacement of what is currently good.

5. Amenities

a. Ashtray/matches.

b. Extra blanket.

c. Coat hangers, wood or metal, sufficient amount for guests.

d. Beverages.

e. Information brochures in rooms.

(1) Base map.

(2) Base telephone directory.

(3) Open mess information.

(4) Base brochure.

(5) Commercial/Government transportation availability.

(6) Government/commercial dining facilities.

(7) Recreation center activities.

(8) On-base and off-base religious services.

(9) Theatre schedules.

(10) Athletic or recreation activities.

(11) TV schedule.

(12) House rules.

(13) Evaluation or critique forms.

(14) Housekeeper’s duties.

(15) Lost key information.

(16) Important telephone numbers.

(17) Items available for checkout at the front desk.

(18) Tour information.

(19) Dialing instructions.

(20) Check-cashing information.

(21) Sundry items available.

AREA II

CATEGORY E - SUPPLY AND EQUIPMENT

1. Request and Receipt Procedures

a. Who initiates/approves request?

b. Follow-up.

c. Source selection records (catalogues, General Service Administration schedules, etc.).

d. Established receipt procedures.

2. Storage Practices; Sundry and Expendable Supply Items

a. Shelving.

b. Location designations.

c. Stock rotation.

d. Security.

e. Orderly.

3. Inventory Control (equipment and supplies)

a. Inventory stock record card.

b. Minimum level designated.

c. Standard order forms in stock.

d. Routine inventories -- supplies and equipment.

e. Accuracy of inventory -- supplies and equipment.

f. Disposal of excess.

4. Equipment Maintenance

a. Preventive maintenance.

b. Instruction manuals/parts-order manuals.

c. Backup equipment.

d. Maintenance contract.

e. Listing of down-equipment.

5. Equipment Availability

a. Location from work area.

b. Proper equipment for the job.

CATEGORY F - GENERAL HOUSEKEEPING

1. Common areas (lobby, hallways, bathrooms, and laundry rooms)

a. Dusting.

b. Walls and ceilings.

c. Windows.

d. Carpet.

e. Furniture.

f. Ashtrays.

g. Trash containers.

2. Outside Areas

a. Landscaping.

b. General.

3. Storage Areas. Neatness.

4. Carpet Maintenance

a. Spot cleaning procedures.

b. Routine cleaning schedule.

c. Walk-off mats being used?

5. Housekeeping (break area)

a. Neat.

b. Furnishings are adequate.

CATEGORY G - FUNDS MANAGEMENT

1. NAF Budget

a. Is it current?

b. Did the area auditor find discrepancies in the Billeting Fund Budget?

c. Are NAF budget goals and objectives clearly defined and understood?

d. Are NAF budgets effectively used to measure progress or lack of progress in achieving stated goals? Are corrective measures taken in a timely manner? Does the NAF budget contain the following components:

(1) Annual operating budget.

(2) Cash flow budget.

(3) Balance sheet projections.

(4) Five-year capital expenditure budget.

e. Do budgets accurately reflect the planned use of resources?

f. Are investments monitored to assure the most effective use of excess cash?

g. Are petty cash purchases within established dollar limits? (May not be used to pay employees or other personal-service functions.)

2. Appropriated Budget

a. Maximum support available.

b. Input to base operation and maintenance budget available for review.

c. Sufficient justification provided to support request.

3. Financial Statements

a. Are they current?

b. Did the area auditor find discrepancies in the billeting fund financial statements?

4. Scheduling

a. Optimum mix of full-time, part-time, and other workers.

b. Clear schedule -- all understand.

c. Posted for workforce.

d. Projected to meet workload.

e. Timecard control adequate.

5. Financial Success

a. Actual versus budget deviation.

b. Income generation initiatives (sundries requirements approved by installation command (NAF council minutes or out-of-session meetings).

c. Personnel expense versus income.

d. Purchase of items out of NAF funds that could be purchased with appropriated funds support.

e. Is the process for gathering and reviewing budget inputs auditable and does it show a practical business approach?

CATEGORY H - OTHER SERVICES

1. Lounge/Kitchen

a. TV.

b. Adequate seating.

c. Table.

d. Desk.

e. Games.

f. Vending Machines.

g. Refrigerator, range, microwave, and related cooking materials.

2. Laundry Room

a. Adequate number of machines (one per 20 occupants).

b. Dry cleaning machines.

c. Folding tables, place to hang clothes, and hangers.

d. Vending machines.

e. Appearance and cleanliness.

f. Convenience.

g. Trash containers.

3. Sundries

a. Shaving cream and razors.

b. Toothpaste and toothbrush.

c. Pain relievers.

d. Clothes detergent and bleach.

e. Shoe polish.

f. Shampoo/conditioner.

g. Deodorant.

h. Beverages.

i. After shave lotion.

j. Sanitary napkins/Tampons.

k. Hair brush and combs.

l. Snacks.

m. Hot foods.

n. Sewing kit.

o. Shower cap.

p. Hairspray.

4. Telephone Service, Lobby Area (patrons access). Availability of:

a. Pay telephones.

b. Class C telephones.

c. AUTOVON access.

d. Services to all rooms with no local charges to occupants.

AREA III

CATEGORY I - ADMINISTRATION SUPPORT STAFF

1. Records Documentation

a. Current file plan.

b. Files maintenance and disposition instructions.

c. Proper filing.

d. Neatness.

2. Maintenance of Publications and Reports. MCO P110000.18 (current edition).

3. Contract Administration

a. Sufficient contracts - documented inspections.

b. Call number procedures and log.

4. Reports. DD Form 2085 (Unaccompanied Personnel Housing (UPH) Inventory and Utilization Data).

5. Certificate of Nonavailability Management

a. Safeguarding (secured).

b. Issue procedures (written procedures, log).

c. Who is authorized to sign (appointed)?

CATEGORY J - TRAINING AND MOTIVATION PROGRAMS

1. Organization and Documentation

a. Is there an active on-the-job training program?

b. Program to train desk clerks?

c. Program to train housekeepers and housekeeping aides?

2. Training Methods and Aids

a. In the classroom.

b. In the rooms/on the desk.

c. Commercial establishment.

d. Books and films.

3. Motivational Techniques/Response. Employee recognition program.

4. Attitude of Personnel

5. Commendations to Personnel/Facilities. Recognition program.

CATEGORY K - PERSONNEL APPEARANCE AND SAFETY

1. Desk clerk appearance and dress

2. Housekeeping staff’s appearance and dress

a. Uniforms.

b. Dress standards.

3. Safety Awareness and Procedures

a. What is their safety record?

b. Is the safety officer active?

c. Is equipment safe, cords frayed, ladders strong, etc.?

d. Are there procedures for cleaning-high areas, changing light bulbs, etc.?

e. Is the safety awareness program ongoing?

CATEGORY L - FACILITY MANAGEMENT

1. Landscaping. Condition of landscaping.

2. Registration parking area

a. Short-term parking available.

b. Well marked.

3. Room Assignments. Directional signs to locate.

4. Allocation of Assets

a. Is the balance of transient quarters and permanent party quarters equitable?

b. Is too much space used for administration and storage?

c. Are sleeping rooms used as office/administration space?

5. Work Order Management

a. Is one person designated to record/report work?

b. Is a log maintained?

c. Are follow-ups completed?

6. Energy Conservation

a. Do housekeepers automatically check thermostats and lights.

b. Are common areas monitored for temperature and lights?

USMC INNKEEPER AWARD
BILLETING EVALUATION RECORD

INSTALLATION _____
DATE _____ TOTAL RATING_____

CATEGORY A - MANAGEMENT
(RATING 1-25 POINTS EACH ITEM)

(1) COMMANDERS SUPPORT _____
(2) ADEQUATE SUPERVISION & RESPONSE _____
(3) EFFECTIVE UTILIZATION OF MANPOWER _____
(4) UPGRADE PROGRAM _____
(5) OPERATING PROCEDURES AND POLICIES _____
CATEGORY RATING _____

CATEGORY B - ROOM HOUSEKEEPING
(RATING 1-25 POINTS EACH)

(1) GENERAL HOUSEKEEPING _____
(2) BATHROOM _____
(3) PROCEDURES _____
(4) QUALITY CONTROL _____
(5) PERSONAL SERVICE ITEMS _____
CATEGORY RATING _____

CATEGORY C - DESK ADMINISTRATION
(RATING 1-25 POINTS EACH ITEM)
(l) APPEARANCE/FUNCTION _____
(2) REGISTRATION PROCESS _____
(3) RESERVATION SYSTEM _____
(4) FUNDS HANDLING _____
(5) COURTESY/CUSTOMER RELATIONS___
CATEGORY RATING _____

CATEGORY D - FURNISHINGS
(RATING 1-25 POINTS EACH)

(l) ADEQUACY _____
(2) MAINTENANCE _____
(3) PLEASING ATMOSPHERE _____
(4) IMPROVEMENT PLANS _____
(5) AMENITIES _____
CATEGORY RATING _____

CATEGORY E - SUPPLY & EQUIPMENT
(RATING 1-15 POINTS EACH ITEM)

(1) REQUEST & RECEIPT PROCEDURES _____
(2) STORAGE PRACTICES _____
(3) INVENTORY CONTROL _____
(4) EQUIPMENT MAINTENANCE _____
(5) EQUIPMENT AVAILABILITY _____
CATEGORY RATING _____

CATEGORY F - GENERAL HOUSEKEEPING
(RATING 1-15 POINTS EACH ITEM)

(1) COMMON AREAS _____
(2) OUTSIDE AREAS _____
(3) STORAGE AREAS _____
(4) CARPET MAINTENANCE _____
(5) HOUSEKEEPING (BREAK AREA) _____
CATEGORY RATING _____

CATEGORY G - FUNDS MANAGEMENT
(RATING 1-15 POINTS EACH ITEM)
(1) NAF BUDGET _____
(2) APPROPRIATED BUDGET _____
(3) FINANCIAL STATEMENTS _____
(4) SCHEDULING _____
(5) FINANCIAL SUCCESS _____
CATEGORY RATING _____

CATEGORY H - OTHER SERVICES
(RATING 1-15 POINTS EACH ITEM)

(l) LOUNGE/KITCHEN _____
(2) LAUNDRY ROOM _____
(3) SUNDRIES _____
(4) TELEPHONE SERVICE _____
CATEGORY RATING _____

CATEGORY I - ADMIN SUPPORT STAFF
(RATING 1-10 POINTS EACH ITEM)

(l) RECORDS DOCUMENTATION _____
(2) MAINTENANCE OF PUBLICATIONS _____
(3) CONTRACT ADMINISTRATION _____
(4) REPORTS _____
(5) CERT. OF NONAVAILABILITY MANAGEMENT _____
CATEGORY RATING _____

CATEGORY J - TRAINING AND MOTIVATION PROGRAMS
(RATING 1-10 POINTS EACH ITEM)

(1) ORGANIZATION AND DOCUMENTATION _____
(2) TRAINING METHODS AND AIDS _____
(3) MOTIVATIONAL TECHNIQUES/ RESPONSE _____
(4) ATTITUDE OF PERSONNEL _____
(5) COMMENDATIONS TO PERSONNEL/ FACILITIES _____
CATEGORY RATING _____

CATEGORY K - PERSONNEL APPEARANCE AND SAFETY
(RATING 1-10 POINTS EACH ITEM)

(1) DESK CLERK APPEARANCE _____
(2) HOUSEKEEPING APPEARANCE/ DRESS _____
(3) SAFETY AWARENESS/ PROCEDURES _____
CATEGORY RATING _____

CATEGORY L - FACILITY MANAGEMENT
(RATING 1-10 POINTS EACH ITEM)

(l) LANDSCAPING _____
(2) REGISTRATION PARKING AREA _____
(3) ROOM ASSIGNMENTS _____
(4) ALLOCATION OF ASSETS _____
(5) WORK ORDER MANAGEMENT _____
(6) ENERGY CONSERVATION _____
CATEGORY RATING _____

# APPENDIX O

## INSTRUCTIONS FOR COMPLETING GENERAL AND FLAG OFFICER QUARTERS MANAGEMENT REPORT (DD FORM 2405)

1. Text Reference: See paragraph 3202.

2. General. This report is required to be submitted to the CMC (LFF) by l November. Marine Corps Report Control Symbol DD-1l103-02 (external Report Symbol DD-P&L(A)1706) has been assigned to this report.

3. Instructions for Completing Blocks (1) through (5)

a. Report Date - Block 1. Enter the date of the last day of the fiscal year.

b. Real Property Inventory Code (RPIC) - Block 2

(l) Army: The five character real property installation number preceded by an "A".

(2) Navy: The five character unit identification code (UIC) preceded by an "N".

(3) Air Force: The four character geographic location code (GEOLOC) preceded by "F".

(4) Marine Corps: The five character UIC preceded by an "M".

(5) Defense Intelligence Agency (DIA): The four character geographic location code (GEOLOC) or the five character real property installation number preceded by an "L".

(6) Defense Logistics Agency (DLA): The five character unit identification code (UIC) preceded by an "S".

c. Installation Data - Block 3

(1) Installation Name. Enter the installation name. Whenever reports are submitted for the first or last time, block 3a of the form will be marked "First Report" or "Last Report," as appropriate.

(2) Major Command/Engineering Field Division. Enter the official short title for the major command.

(3) State. For installations in the United States, enter the name of the state or the District of Columbia. If not in the United States, leave blank.

(4) ZIP Code. Enter the nine character hyphenated postal ZIP code of the reporting installation.

(5) Country. Installations in the United States, enter "US". Installations located in a US possession (such as Guam, Midway Island, Puerto Rico, Virgin Islands, or Wake Island), enter the name of the possession. For installations in a foreign country, enter the name of the country.

d. Quarters Data - Block 4

(1) Quarters Identification Code (QIC). Enter the appropriate QIC shown in figure 0-1.

(2) Local Quarters Identification. Enter the local quarters number, facility number, or street address used by the installation.

(3) Net Floor Area. Enter the net floor area in square feet.

(4) Year Built. Enter the year the unit was constructed.

e. Management Data - Block 5

(1) Operations. Enter the operations amount obligated, less leasing obligations, for the fiscal year.

(2) Lease. Enter the leasing amount obligated for the fiscal year.

(3) Maintenance and Repair. Enter the total maintenance and repair obligations for the fiscal year including incidental improvements.

(4) Total Operation and Maintenance. Enter the sum of lines 5a, 5b, and 5c on the Form.

(5) Congressionally Approved Amount for O&M. Enter the congressionally approved amount, if applicable.

(6) Improvements. Enter the total improvements (post acquisition construction) obligations for the fiscal year.

NOTES:

l. Express each entry in Blocks 5.a through 5.f in whole dollar amounts only.

2. Under "congressionally Approved Amount for O&M" reflect a dollar amount only if the maintenance, repair and/or improvements costs exceeded the congressional limitation of $25,000 per unit per year and was congressionally approved. If the maintenance, repair and/or improvements did not exceed the Congressional limitation, show "N/A" in the block.

| Activity | Quarters No. | QIC |
|---|---|---|
| MCLB, Albany GA | 10500 | BA |
| MCB, Camp Lejeune NC | 2000 | BC |
| | 2001 | BD |
| | 2002 | BE |
| | 2003 | BF |
| | H-27 | BG |
| MCRD/ERR, Parris Island SC | 1 | HB |
| MCCDC, Quantico VA | 1 | AC |
| | 6 | HM |
| | 8 | HH |
| | 11 | HA |
| | 12 | HD |
| | 376 | HF |
| MCRD/WRR, San Diego CA | M-1 | FA |
| MCB, Camp Pendleton CA | 1152 | CA |
| | 1154 | CB |
| | 17151 | FD |
| | 17152 | FE |
| | 17153 | CC |
| | 24154 | CD |
| MCLB, Barstow CA | 1 | BB |
| MCAS, Cherry Point NC | 316 | CE |
| | 317 | CF |
| | 318 | DA |
| MCAS, El Toro CA | A | DD |
| | B | DE |
| MCAS, Tustin CA | A | DF |
| MCAGCC, 29 Palms CA | 1 | FC |
| Mar Bks 8th & I Wash DC | 1 | AB |
| | 2 | DB |
| | 4 | DC |
| | 6 | AA |

Figure O-1.--General Officer Quarters Identification Code (QIC).

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