

**Rural Utilities Service, USDA**

**Pt. 1730, Subpt. B, App. A**

**APPENDIX A TO SUBPART B OF PART 1730—REVIEW RATING SUMMARY, RUS FORM 300**

Pad Mounted Equipment—Appearance: \_\_\_\_\_  
Settlement, Condition—Rating: \_\_\_\_\_  
e. Kilowatt-hour and Demand Meter Reading and Testing—Rating: \_\_\_\_\_

Borrower Designation \_\_\_\_\_  
Date Prepared \_\_\_\_\_

Ratings on form are:

- 0: Unsatisfactory—no records
- 1: Unsatisfactory—corrective action needed
- 2: Acceptable, but should be improved—see attached recommendations
- 3: Satisfactory—no additional action required at this time
- N/A: Not applicable

**PART I—TRANSMISSION and DISTRIBUTION FACILITIES**

- 1. Substations (Transmission and Distribution)
  - a. Safety, Clearance, Code Compliance—Rating: \_\_\_\_\_
  - b. Physical Condition: Structure, Major Equipment, Appearance—Rating: \_\_\_\_\_
  - c. Inspection Records Each Substation—Rating: \_\_\_\_\_
  - d. Oil Spill Prevention—Rating: \_\_\_\_\_
- 2. Transmission Lines
  - a. Right-of-Way: Clearing, Erosion, Appearance, Intrusions—Rating: \_\_\_\_\_
  - b. Physical Condition: Structure, Conductor, Guying—Rating: \_\_\_\_\_
  - c. Inspection Program and Records—Rating: \_\_\_\_\_
- 3. Distribution Lines—Overhead
  - a. Inspection Program and Records—Rating: \_\_\_\_\_
  - b. Compliance with Safety Codes: Clearances—Rating: \_\_\_\_\_  
Compliance with Safety Codes: Foreign Structures—Rating: \_\_\_\_\_  
Compliance with Safety Codes: Attachments—Rating: \_\_\_\_\_
  - c. Observed Physical Condition from Field Checking: Right-of-Way—Rating: \_\_\_\_\_  
Observed Physical Condition from Field Checking: Other—Rating: \_\_\_\_\_
- 4. Distribution—Underground Cable
  - a. Grounding and Corrosion Control—Rating: \_\_\_\_\_
  - b. Surface Grading, Appearance—Rating: \_\_\_\_\_
  - c. Riser Poles: Hazards, Guying, Condition—Rating: \_\_\_\_\_
- 5. Distribution Line Equipment: Conditions and Records
  - a. Voltage Regulators—Rating: \_\_\_\_\_
  - b. Sectionalizing Equipment—Rating: \_\_\_\_\_
  - c. Distribution Transformers—Rating: \_\_\_\_\_
  - d. Pad Mounted Equipment—Safety: Locking, Dead Front, Barriers—Rating: \_\_\_\_\_

**PART II—OPERATION AND MAINTENANCE**

- 6. Line Maintenance and Work Order Procedures
  - a. Work Planning and Scheduling—Rating: \_\_\_\_\_
  - b. Work Backlogs: Right-of-Way Maintenance—Rating: \_\_\_\_\_  
Work Backlogs: Poles—Rating: \_\_\_\_\_  
Work Backlogs: Retirement of Idle Services—Rating: \_\_\_\_\_  
Work Backlogs: Other—Rating: \_\_\_\_\_
- 7. Service Interruptions
  - a. Average Annual Hours/Consumer by Cause (Complete for each of the previous 5 years)
    - 1. Power Supplier \_\_\_\_\_
    - 2. Major Storm \_\_\_\_\_
    - 3. Scheduled \_\_\_\_\_
    - 4. All Other \_\_\_\_\_
    - 5. Total \_\_\_\_\_  
Rating: \_\_\_\_\_
    - b. Emergency Restoration Plan—Rating: \_\_\_\_\_
- 8. Power Quality
  - General Freedom from Complaints—Rating: \_\_\_\_\_
- 9. Loading and Load Balance
  - a. Distribution Transformer Loading—Rating: \_\_\_\_\_
  - b. Load Control Apparatus—Rating: \_\_\_\_\_
  - c. Substation and Feeder Loading—Rating: \_\_\_\_\_
- 10. Maps and Plant Records
  - a. Operating Maps: Accurate and Up-to-Date—Rating: \_\_\_\_\_
  - b. Circuit Diagrams—Rating: \_\_\_\_\_
  - c. Staking Sheets—Rating: \_\_\_\_\_

**PART III—ENGINEERING**

- 11. System Load Conditions and Losses
  - a. Annual System Losses, \_\_\_\_\_%—Rating: \_\_\_\_\_
  - b. Annual Load Factor, \_\_\_\_\_%—Rating: \_\_\_\_\_
  - c. Power Factor at Monthly Peak, \_\_\_\_\_%—Rating: \_\_\_\_\_
  - d. Ratio of Individual Substation Peak kW to kVA, \_\_\_\_\_—Rating: \_\_\_\_\_
- 12. Voltage Conditions
  - a. Voltage Surveys—Rating: \_\_\_\_\_
  - b. Substation Transformer Output Voltage Spread—Rating: \_\_\_\_\_
- 13. Load Studies and Planning
  - a. Long Range Engineering Plan—Rating: \_\_\_\_\_
  - b. Construction Work Plan—Rating: \_\_\_\_\_
  - c. Sectionalizing Study—Rating: \_\_\_\_\_
  - d. Load Data for Engineering Studies—Rating: \_\_\_\_\_

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e. Load Forecasting Data—Rating: \_\_\_\_\_

1735.23-1735.29 [Reserved]

**PART IV—OPERATION AND MAINTENANCE BUDGETS**

**Subpart C—Types of Loans**

For Previous 2 Years:

Normal Operation—Actual \$ \_\_\_\_\_  
Normal Maintenance—Actual \$ \_\_\_\_\_  
Total—Actual \$ \_\_\_\_\_

1735.30 Hardship loans.  
1735.31 RUS cost-of-money and RTB loans.  
1735.32 Guaranteed loans.  
1735.33 Variable interest rate loans.  
1735.34-1735.39 [Reserved]

For Present Year:

Normal Operation—Budget \$ \_\_\_\_\_  
Normal Maintenance—Budget \$ \_\_\_\_\_  
Total—Budget \$ \_\_\_\_\_

**Subpart D—Terms of Loans**

For Future 3 Years:

Normal Operation—Budget \$ \_\_\_\_\_  
Normal Maintenance—Budget \$ \_\_\_\_\_  
Additional (Deferred) Maintenance—Budget \$ \_\_\_\_\_  
Total—Budget \$ \_\_\_\_\_

1735.40 General.  
1735.41 Notes.  
1735.42 [Reserved]  
1735.43 Payments on loans.  
1735.44 Prepayment premiums.  
1735.45 Extension of payments.  
1735.46 Loan security documents.  
1735.47 Rescissions of loans.  
1735.48-1735.49 [Reserved]

14. Budgeting:

Adequacy of Budgets For Needed Work—Rating: \_\_\_\_\_

**Subpart E—Basic Requirements for Loan Approval**

15. Date Discussed with Board of Directors \_\_\_\_\_

Remarks: \_\_\_\_\_

1735.50 Administrative findings.  
1735.51 Required findings.  
1735.52 Findings required for particular loan purposes.  
1735.53-1735.59 [Reserved]

**EXPLANATORY NOTES**

Item No. \_\_\_\_\_ Comments \_\_\_\_\_  
Rated by \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

**Subpart F—Mortgage Controls on Acquisitions and Mergers**

Reviewed by \_\_\_\_\_ Manager \_\_\_\_\_ Date \_\_\_\_\_

Reviewed by \_\_\_\_\_ RUS GFR \_\_\_\_\_ Date \_\_\_\_\_

1735.60 Specific provisions.  
1735.61 Approval criteria.  
1735.62 Approval of acquisitions and mergers.  
1735.63-1735.69 [Reserved]

**PART 1735—GENERAL POLICIES, TYPES OF LOANS, LOAN REQUIREMENTS—TELECOMMUNICATIONS PROGRAM**

**Subpart G—Acquisitions Involving Loan Funds**

**Subpart A—General**

Sec.  
1735.1 General statement.  
1735.2 Definitions.  
1735.3 Availability of forms.  
1735.4-1735.9 [Reserved]

1735.70 Use of loan funds.  
1735.71 Nonrural areas.  
1735.72 Acquisition agreements.  
1735.73 Loan design.  
1735.74 Submission of data.  
1735.75 Interim financing.  
1735.76 Acquisition of affiliates.  
1735.77 Release of loan funds, requisitions, advances.  
1735.78-1735.79 [Reserved]

**Subpart B—Loan Purposes and Basic Policies**

**Subpart H—Acquisitions or Mergers Not Involving Additional Loan Funds**

1735.10 General.  
1735.11 Area coverage.  
1735.12 Nonduplication.  
1735.13 Location of facilities and service for nonrural subscribers.  
1735.14 Borrower eligibility.  
1735.15 Civil rights.  
1735.16 Minimum loan amount.  
1735.17 Facilities financed.  
1735.18 Additional equity.  
1735.19 Mergers and consolidations.  
1735.20 Acquisitions.  
1735.21 Refinancing loans.  
1735.22 Loan security.

1735.80 Submission of data.  
1735.81-1735.89 [Reserved]

**Subpart I—Requirements for All Acquisitions and Mergers**

1735.90 Preliminary approvals.  
1735.91 Location of facilities.  
1735.92 Accounting considerations.  
1735.93 Notes.