



Obtaining Facility Condition Assessment Data for Strategic Capital Planning

A Strategic Approach

GORDIAN[®]

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Executive Summary

The goal of strategic facilities capital planning is to prepare accurate budgets and secure the necessary funding for the most important projects within a facility portfolio. Leaders must consider numerous factors to optimally prioritize this critical work. Organizational mission is an obvious influencing factor, and asset conditions, facility function and, of course, time and budget constraints are typically considerations as well.

Coalescing these priorities and considerations into a successful facilities capital plan requires an understanding of the facilities portfolio that can only be reached with current, accurate condition data.

Gordian has decades of experience and a wealth of expertise collecting the data organizations need to develop sophisticated and resilient capital plans tailored to their priorities. This eBook describes the Gordian assessment options organizations across North America use to make savvy investment decisions.

Efficiently obtaining facility condition data requires a strategy that answers the following questions:



What organizational goals must be supported?



How much detail is needed?



How is data obtained?



How often should facilities data be gathered?



Where should data be stored?



How should data be shared?



What Organizational Goals Must Be Supported?



Many organizational goals are tied directly to the health of the facility portfolio. This means that decisions made about facilities echo across departments, roles and time. The stakes are that high.

Organizational objectives may include:

- Expanding service offerings and programs
- Optimal mission readiness
- Progress toward sustainability initiatives
- Appealing to a new market

It's crucial to first determine and prioritize objectives before adopting a data collection strategy, because these decisions will dictate the type and detail of analysis and reporting. Organizational goals can also impact how data is gathered, how frequently it is gathered and where it is stored.

The Connection Between Data and Goals

Managing all the information related to facilities, their related systems and other physical assets is an incredible challenge for organizations of all sizes. It can seem as though they have too much data in too many places maintained too inconsistently. Current data about building value, condition, age, function, and maintenance and renewal needs is often scattered across multiple locations and systems, creating islands of information. And that's if the current data exists at all.

As a result, organizations have limited insights into operational issues that can impact planning significantly. Facility directors may be uncertain about how completed projects affect their annual funding requirements. At the same time, CFOs and other executives lack a clear picture of how facilities spending decisions support their strategic objectives.

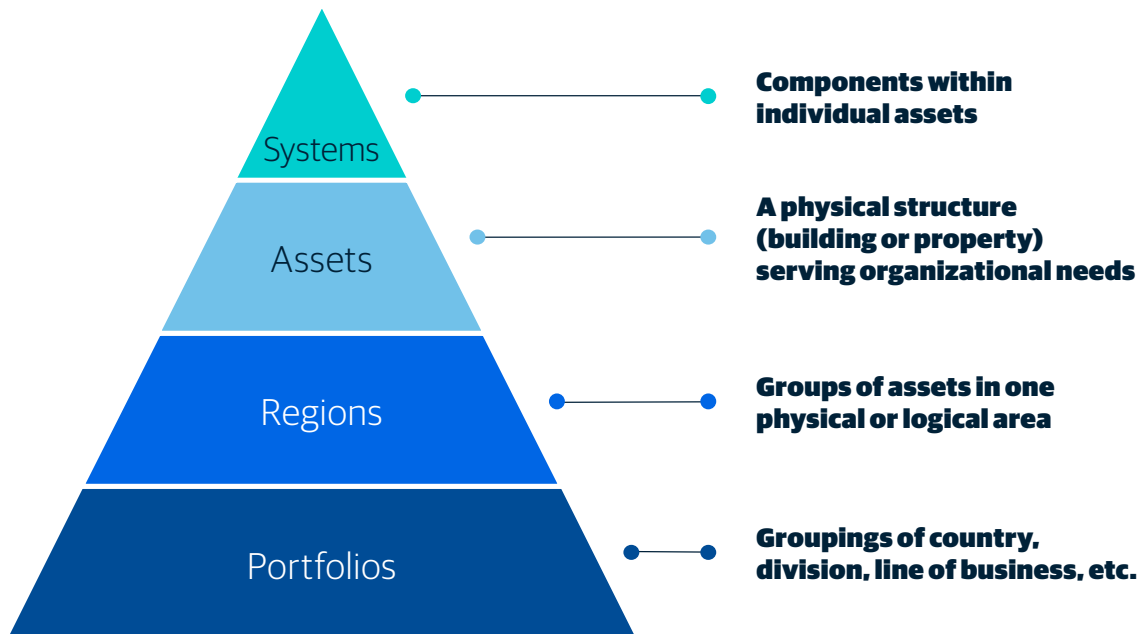


How Much Detail is Needed?



Once organizations are aligned on their objectives, their next step is to determine how much detail they need to make decisions. For instance, the detail necessary to obtain insights into the total liability of the entire portfolio is far more granular than the detail necessary to simply identify systems that are beyond their useful life. And those are just two examples on a long spectrum.

To help define a data collection strategy and determine what data to collect and how to organize it, it may be useful to think of your facilities and physical assets in a hierarchical structure.



Within each level of the hierarchy lies the potential to collect data and identify improvement opportunities such as reducing deferred maintenance, addressing urgent needs, resolving building code issues, shoring up operational problems and renewing or replacing systems or components.

Types of Information Gathered

- Location
- Building type
- Square footage
- Functional use such as school or office building
- Number of systems in each building
- Type of systems such as HVAC, roofing or flooring
- System age
- Improvement needs
- Recommended actions
- Costs
- Linear asset details
- Energy usage

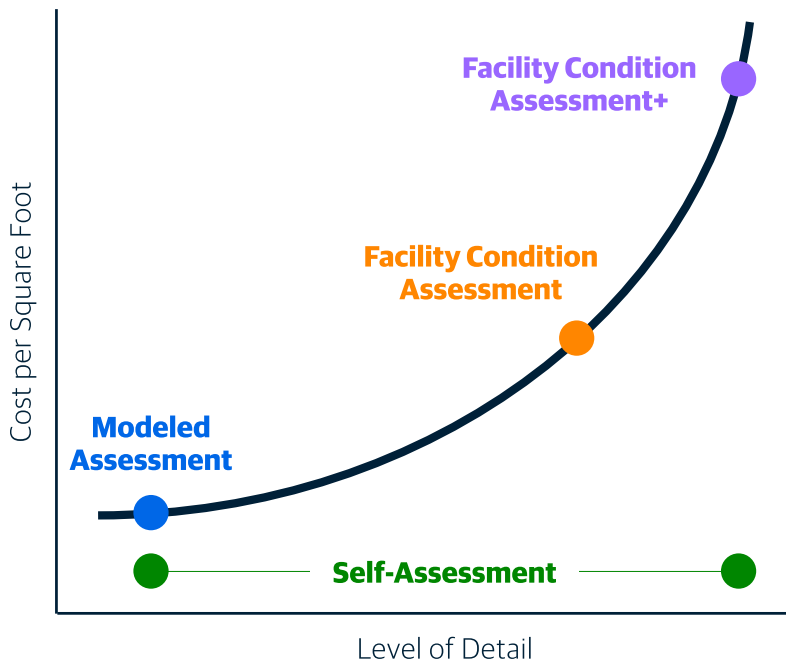
How is Data Obtained?



Once organizations are aligned on their objectives, the level of detail they require for each asset and the resources they can commit to data collection, they can strategically apply Gordian's assessment options to their facilities portfolio.

Gordian's **Self-Assessment** solution is an excellent fit for organizations seeking the tools, standards and resources to perform in-house capital planning. As the most flexible and cost-efficient option available, Self-Assessment (located on Gordian Cloud Platform) is fully controlled in-house by an organization's staff. It is intended to be used by groups that have a strong command of the capital planning process, yet lack the latest software and standardization needed to create quality capital plans.

Turning data collection duties over to in-house staff lowers costs but that savings comes at the expense of team bandwidth. That's why most organizations limit the scope of a Self-Assessment to a specific facility or area.



How is Data Obtained?

Another way to gather facilities data is Gordian's **Modeled Assessment**. Affordable and designed to provide high-level budgetary requirements for buildings and assets that are similar in style, the Modeled Assessment is efficient and non-disruptive.

One important thing to note about this assessment option is that it utilizes square foot cost data and statistical models rather than bringing a Gordian assessor on-site. Because the Modeled Assessment is intentionally created for speed and affordability, some of the lengthier components of other FCA solutions are not part of this tier.

When an organization's leaders need a comprehensive understanding of their facilities' needs and condition, Gordian's **Facility Condition Assessment** is the most appropriate offering. Delivering asset-level details that are collected by experts on-site, this option provides the necessary information to make data-driven capital planning decisions.

The Facility Condition Assessment is ideal for those who:

- Require a baseline understanding of the needs of all facilities in their portfolio
- Need to make high-level building decisions
- Want a third-party independent perspective
- Work as part of a facilities team, especially those in leadership and decision-making roles

This assessment tier also provides organizations with boots-on-the-ground validation of system-level inventory, ensuring the highest degree of accuracy and expertise.

Benchmark against industry standards with Gordian's full range of assessment services.



How is Data Obtained?

Gordian's enhanced **Facility Condition Assessment+** (FCA+) offering is designed for those who require project-level detail to effectively plan and execute their maintenance and renovation work.

Comprehensive and detail-packed, the FCA+ service goes beyond our traditional Facility Condition Assessment. It involves a meticulous process to pinpoint every specific action that needs to be taken, observable across your entire inventory. This means not just identifying the obvious renewal needs but also documenting additional requirements that are often overlooked like code compliance, life and safety needs and potential modernizations. Features unique to this tier include identification of regulatory or optimization requirements, identification of projects that can extend Remaining Useful Life (RUL) and a narrative summary to support field findings.

FCA+ is ideal for organizations looking for a thorough evaluation that captures both existing deficiencies and opportunities for improvements, ensuring they have the detailed information necessary for informed decision-making and strategic planning.

This expanded FCA service goes beyond the standard assessment by intensively identifying all specific required actions across the entire inventory.



Gordian's Assessments and Capital Planning solutions build upon the successful legacies of Sightlines and VFA, companies we acquired to build a best-in-class product portfolio.



How Often Should Facilities Data Be Gathered?

The frequency of data capture will vary by organizational need. Yearly assessments provide a consistent flow of accurate data that informs investment decisions, but that might not be the right frequency for every asset in your portfolio. It is a best practice to ensure your current budget reflects your current priorities. Doing so means analyzing current data.



Where Should Data Be Stored?

Ideally, facility condition data should be stored in a central, secure database that all stakeholders can access. It's important to have defined business rules for how and when data is transferred from one place to another, who has editing permissions and for what data, and which data your organization trusts to integrate with its own.



How Should Data Be Shared?

The worst thing you can do after gathering facility condition data is to put it on a shelf. This data should be shared with all facilities stakeholders, from maintenance staff to high-level executives and leaders, all of whom have important roles to play within your organization and input on achieving strategic goals. Each of these key players may have a preferred way to receive the data, but secure, web-based access is best for consistency and mobility.



Using data gathered from condition assessments, Gordian's technologies can calculate Facility Condition Index, a universally-accepted performance measurement.

About Gordian

Gordian is the leading provider of Building Intelligence™ Solutions, delivering unrivaled insights, robust technology and expert services to fuel customers' success through all phases of the building lifecycle. Gordian created Job Order Contracting (JOC) and the industry-standard RSMeans™ Data. We empower organizations to optimize capital investments, improve project performance and minimize long-term operating expenses.

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To learn more, visit gordian.com/fca or contact us at info@gordian.com or 800.874.2291

