



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. The 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.

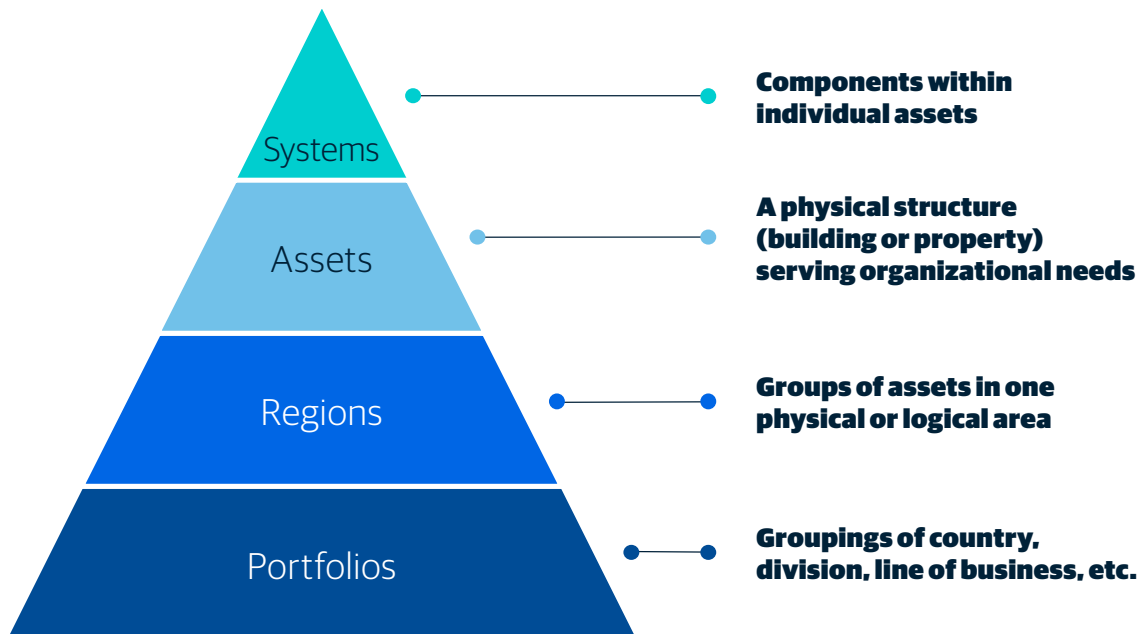


How Much Detail is Needed?



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

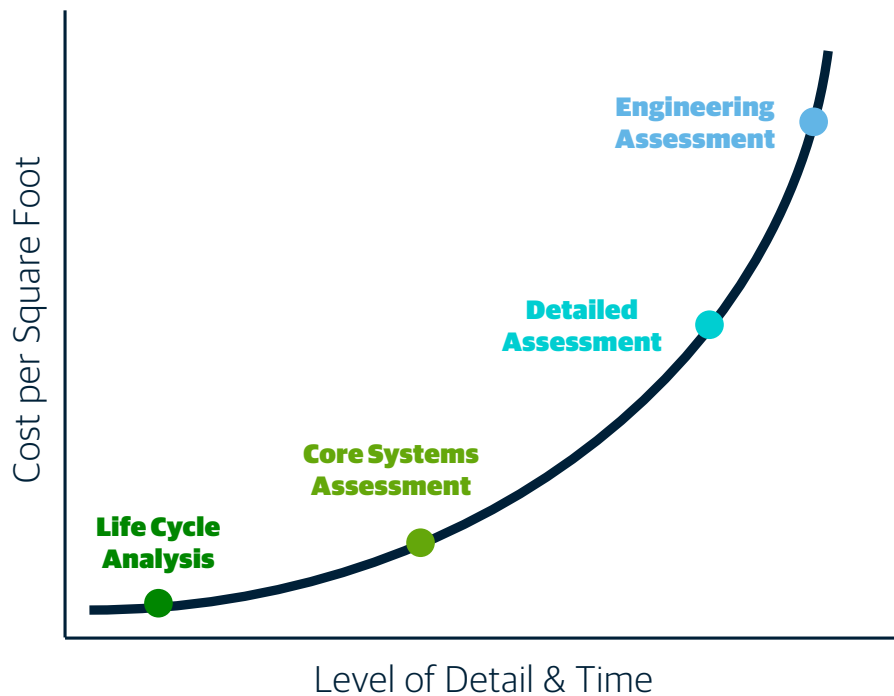
How is Data Obtained?



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.

When it is only necessary to obtain a high-level understanding of asset conditions and replacement and renewal costs, organizations turn to Gordian's **Life Cycle Analysis**. This assessment minimizes human intervention by using data and statistical modeling to estimate the approximate costs of replacing a general system or asset at a given age. It will not tell an organization the approximate costs of replacing their specific system or asset.

For this reason, it is best to use the Life Cycle Analysis on newer assets, those carrying less strategic importance or as a baseline for identifying where a more thorough assessment is necessary.



How is Data Obtained?

Another way to gather facilities data is to have your in-house team complete one of our **Core Systems Assessments**. More detailed than the Life Cycle Analysis, this type of assessment asks existing staff to log current asset conditions using cutting edge survey tools loaded on mobile devices. These technologies automatically create maintenance requirements and estimate costs using our RSMeans Data construction cost database.

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 will limit the scope of a Core Systems Assessment to a specific facility or area.

A **Detailed Assessment** conducted by a qualified assessor is another option for obtaining facility data. A step up from the Core Systems Assessment both in granularity and in time to complete. Getting experienced eyes on your facilities can help build out a more detailed look at how they are operating and their true condition. Having expert validation of conditions can help support your in-house multi-year capital planning efforts and help you build a case for additional funding from your organization's leadership.

Because a Detailed Assessment is more costly and labor-intensive than statistical modeling and self-assessments, it is wise to use them for assets that require a lot of maintenance and/or are strategically important to achieving your organization's goals.

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



How is Data Obtained?

When you need a deep understanding of how your building systems are operating, Gordian's **Engineering Assessment** is the optimal choice. This intensive, component-level assessment is ideal for informing strategic capital funding decisions.

These evaluations are conducted by experienced assessors, some of whom are engineers. From the boiler room to the roof, our experts document the entire facility and its various components. An Engineering Assessment generates more detail than other Gordian assessments, including information on code compliance and accessibility. This can give your organization more perspective into how your facilities perform on a functional level.

Engineering Assessments are the most time and resource-intensive assessment type Gordian offers. That's why they aren't appropriate for every situation. However, if an "engineer-assessed" report is required of your organization, if you need to present capital needs in a consistent language and format, and/or if an asset is of the utmost strategic importance, our Engineering Assessment delivers all the data you need the way that you need it.



Gordian's Assessment 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 comprehensive expertise that fuel customers' success during every phase of the Building Lifecycle. Gordian created Job Order Contracting (JOC) and the industry standard RSMean 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
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