

## Some New Thoughts About FCAs

by Matt Adams, P.E.

The use of facility condition assessments is commonplace in our industry now. However, the costs are still significant. There are some new best practices that have been learned over the last few years that can improve the return on this “significant” investment. When updating or conducting an initial facility condition analysis (FCA), the individual or team that is given this charge should utilize the following “to do” list in order to get the most from the effort.

### 1. Capital Budgeting Process

**Review** The FCA project team reviews and documents the capital budgeting process employed by the institution. The unique processes, priorities, IT legacy systems, and desired improvement are assessed. This interactive planning time onsite allows the consulting team and the clients to fully identify the exact data decision points that must be delivered by the FCA project. This upfront planning ensures that the campus is provided only the specific budgetary information required and in the exact format. No extraneous data or formatting is conducted, thus reducing available project time for the information that is most critical to the long-term success of the project.

**2. Facility Data Integration** Much has been said about “mapping” data from existing city FM software systems, e.g. CMMS, to the facility



audit software system. In fact, emphasis on mapping or converting data from one system to another after the FCA efforts are complete is too late in the planning process. Previous experience has shown that mapping data a year or more after the FCA is complete is cumbersome and inefficient. The FCA team should carefully examine the current IT systems in the overall Facility Management Department. By understanding the data structure of legacy systems from the start, the FCA data collection hierarchy, format, and storage location can be optimized to allow data exchange with the minimum of mapping and a high level of consistency. The goal is to avoid introducing any new data hierarchies or inconsistencies that require “mapping.” This up front planning effort has considerable return on investment in terms of long-term accuracy and utilization of the FCA data model.

**3. FCA Report Design** The specific reports that are required to support the unique capital budgeting and prioritization process for the

institution should be design at the start and created in a facilitated forum. These reports are a direct result of the previous research of the current institutions budgeting processes and systems. In every new FCA, industry best practices are considered and utilized or customized to the unique environment of your institution.

### 4. Interpretation of FCA Results

The accurate interpretation and delivery of the project's results are critical to the success of the effort. The careful design of the FCA and its formats and structure in the context of current policies and procedures pays dividends at this point. A highly accurate and targeted message is delivered that is completely compatible with the capital budgeting language of the institution. The robustness of the FCA data must be considered. A variety of deficiency types must be lined with a variety of internal institutional funding streams. There are at least five categories of capital budgeting expenditures and the FCA team should take great care in rationalizing the FCA

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## 5. Preparation of the Capital

**Budget Models** Best practices show that the FCA team must develop proposed financing packages for the multiple funding streams of the capital budgeting models generated by the FCA. A proven process of facilitated planning meetings allows the team to compile multiple funding packages that are consistent with each particular source of funds. Basic business rules taken from industry best practices are used to initiate discussions that result in unique solutions to the capital unfunded requirements. For example, one new idea to introduce is the “Delta T” renewal model. This industry best practice was recently used at the University of Arkansas to fund ongoing renewal and technology upgrades to the total complement of HVAC systems on campus—from chillers to diffusers. This self-perpetuated funding model ensures that the University of Arkansas’ Energy systems maintain top operational performance while achieving the full length of their designed life-cycles. This “stealthy” funding best practice is one of many examples of cutting-edge capital budget models that should be considered by each institution. 🏠



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