The Effective Occupancy of a Building: The TurnOver Group

By Theodore J. Weidner, Ph.D., P.E., CEFP, AIA

New construction and renovation of educational facilities never stops. Buildings are being constructed or renovated on campus, and the operations and maintenance (O&M) staff is faced with changes resulting from these capital construction projects. How the projects are implemented determines the success or failure of the turnover and occupancy of the buildings. Too often, the O&M staff is excluded from the process until it is too late. Frequently, there's a scramble to identify what is required keep a building clean, identify the filter and lamp replacement needs, and store the attic stock that the contractor just dropped off with the building keys. There needs to be a better way—and there is.

THIRD EDITION OF OPERATIONAL GUIDELINES

The third edition of APPA's *Operational Guidelines for Educational Facilities: Maintenance* will include a chapter that should help facilities officers improve the handover process of a new or renovated building. The process will also help keep more accurate records of building operating costs, which will support the total cost of ownership goals of the facilities organization. The process is called "TOW," which stands for "TurnOver Workgroup."

Essentially, the TOW consists of representatives of both the PD&C (planning, design, and construction) and O&M groups within facilities. They begin their efforts at the start of the project, before design commences, ideally as the building is being programmed or defined. This occurs in parallel with any commissioning plan development and may subsume the commissioning efforts.

The TOW identifies O&M goals (e.g., the APPA Custodial and Maintenance levels), and the staffing needs to provide the desired levels of service. This is the ideal time to identify programmatic needs for building operations, the size and location of custodial closets, and other building maintenance and storage needs. The TOW also defines the information requirements for the CMMS (computerized maintenance management system) so that construction contractors know what is expected in the way of as-built documents.

SAVINGS COSTS WITH MEANINGFUL INFORMATION

The result of these efforts is a plan that facilitates efficient, effective occupancy of the building. It lays the groundwork for effective maintenance by populating the CMMS with meaningful information for preventive maintenance and other maintenance needs. More importantly, it provides for better decision making during the design and construction of the building, when critical value engineering decisions are made.

Following this process—despite the perceived extra cost for meetings and personnel time—reduces the total cost of ownership by avoiding the cost of additional work that could have been addressed as a warranty item and by organizing the thousands of building components that might have to be identified later through a costly consultant survey project.

As has been said many times in APPA programs, "Begin with the end in mind." Doing so will save time, while improving decisions, resource allocation, and customer service, by ensuring that the O&M group is more effective and service-focused rather than constantly playing catch-up because important information is missing or hard to locate.

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