

# FACILITIES ASSESSMENT AND CAPITAL PLANNING, EXPLAINED.



## START HERE

Looking to develop a comprehensive facilities plan? A Needs Assessment is the first step, and is desired to determine what's next so that a great plan can be put in place; one in which costs are identified and standards implemented to get maximum value from your available resources. Given those goals, our process for the desired Capital Improvements Planning is as follows.

## 1. INITIAL PLANNING MEETING

Our initial meeting will allow us to hear your goals and concerns for the study. We'll discuss your "hoped-for" outcomes of the Assessment and Planning process. We'll discuss the financing for the construction project and the its intended budget. If desired, we can meet with a large group of stakeholders such as board members, building administration, and support staff.



We will work to map out the planning process (confirm facilities to be included in assessment, determine work activities, meetings, participants, responsibilities, schedule, communications approach, and any necessary required submittals for approval); We will hold an initial Database customization session (determine fields to be tracked and format for recording, collecting, sharing, processing and analyzing data); and gathering any previous planning information (previous assessments, reports, or planning, and facility plans).



## 2. FACILITIES REVIEW: THE "PAPER TOUR"

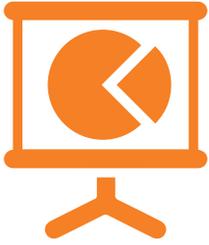
Before one step is taken through the facilities, the condition of the existing construction and history of building renewal will be recorded. The assessment team will meet with stakeholders knowledgeable of the history and condition of each of the facilities. Information recorded in this meeting will begin to populate the facilities database.



## 3. CONDUCT THE FACILITIES ASSESSMENT

BLDD Architects will bring a team of experts into the building to evaluate the existing layout, flow, and function. We will evaluate the building structure, roof, exterior wall systems, and mechanical and electrical systems to develop a comprehensive understanding of your facility. We will evaluate the code compliance of the building for consideration when evaluating the feasibility of alternate approaches.

The BLDD Building walk-through will be accompanied with representatives of your organization. Information will be collected with handheld tablet computers and recorded as it is observed, insuring accuracy and reducing time to develop the report. Important physical conditions will be photographed and added to the database. The walk through will develop the information needed for a long term facilities plan.



#### 4. INITIAL DATABASE REVIEW

Our team will present the database of conditions for discussion to develop a common understanding of need. This database will allow you to develop long-term capital improvements plans with yearly cost projections to meet your facility planning and budgeting needs. As a database, this program will allow you to model any variety of possible options.

From the information gathered, we will develop multiple options of how the goals of the assessment and planning study could fit within the existing constraints. We will integrate your goals with emerging and established trends, helping you envision the possibilities.



#### 5. MEETING WITH STAKEHOLDERS

With these initial ideas, we will meet again with the appropriate stakeholders to gain preliminary feedback to the concepts. Some of the ideas will work, others may not. We'll take time to discuss these possibilities and the pros and cons of each. This work will involve review competing scenarios for implementation, looking at alternative work groupings, working to identify which approach is most cost effective.



#### 6. REFINE THE OPTIONS

After the meeting with the stakeholders we'll take the initial options and make revisions from the input given. We'll continue to develop at least three Implementation options for consideration.



#### 7. EVALUATE THE COSTS

Studying these three options for Capital Improvements Planning implementation, we will evaluate the relative costs of each and review using a life-cycle comparison approach. We will continue to study the financing implications and opportunities for state support.



#### 8. PRESENT THE PLAN

After review by the necessary parties, BLDD will present the results of the Assessment and Planning Implementation study to the appropriate entities.



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