



**Board of Regents of the University
System of Georgia**

Scope of Services Template

For

Facilities Condition Assessment Services

For

Public Private Ventures Projects

The University System of Georgia

Revision No. 1 - April 30, 2013

FACILITIES CONDITION ASSESSMENT SERVICES REQUIREMENTS

The following is a list of items that represent the “Scope of Services” for Facilities Condition Assessments and format the “Facilities Condition Assessment Report”. Items shown are not all inclusive and are only a recommendation for the minimum items to be included in performance of the Facilities Condition Assessment and in developing the format for the Facilities Condition Assessment Report.

I. SCOPE OF SERVICES

Facilities Condition Assessment Services provided shall determine the current physical condition and the life cycle of designated USG PPV properties and facilities. Also, these services shall document all activities in detailed reports that shall provide baseline data, benchmarks and metrics by which campuses can effectively plan and execute highly efficient and cost effective:

- Executive Management (capital funding, strategic planning, risk analysis)
- Fiscal Planning (program oversight, budget projections, scenarios planning, facility disposal)
- Divisional Management (program execution, cost accounting, procurement)
- Facilities Management (condition management, project planning, needs prioritization)

Firm(s) supplying Facilities Condition Assessment Services must provide the following.

A. Facilities Condition Assessments (FCA’s)

- A1. The Facilities Condition Assessment (FCA) shall include inspections and accurate analyses of all visible components and elements of designated properties and facilities requiring maintenance or planned action. The results of the Facilities Condition Assessments shall be detailed in a Facilities Condition Assessment Report (FCAR). The processes for both, the FCA and FCAR shall be in accordance with the standards and practices as identified by IFMA and ASTM-E2018-08. Selective destructive investigations may be authorized if there is evidence of hidden defects.
- A2. The Facilities Condition Assessment shall at a minimum:
1. Capture and record certain physical building characteristics and information as identified by the Owner.
 2. Identify the current physical condition of each component or element and any deficiencies.
 3. Identify maintenance projects for the individual properties and facilities required to return the asset to functionality or to a minimum standard condition in order to preserve asset value.
 4. Identify all code and all regulatory violations and all deficiencies.
 5. Recommend corrective action for all violations and all deficiencies.
 6. Prioritize capital repair projects.
 7. Estimate the cost to correct, improve or reduce further deterioration of the physical assets.
 8. Identify corrective measures required to ensure that the facility operates as designed.
 9. Collect data from inspections and document the results.

- A3. Major components for Facilities Condition Assessments shall include all of the following unless not applicable:
1. Sitework (utilities; roads, parking, paving, sidewalks, pavers, signage, fencing; irrigation, storm water, retaining walls, sanitary sewer/drainage systems; erosion control, landscaping, lighting systems, etc.).
 2. Site Amenities (playgrounds, athletic courts, gazebos, swimming pools)
 3. Building Structure (foundations, structural joists, decking, columns and supports)
 4. Building Exterior (roofs, roofing structures, balconies, breeze-ways, stairs, exterior walls, exterior windows, doors, & hardware)
 5. Building Interior (furniture, appliances, finishes, floors, ceilings, walls, casework, fixtures, doors and hardware)
 6. Vertical Transportation (escalators, passenger and freight elevators)
 7. Mechanical (heating, ventilation and air conditioning, vents, ductwork, piping, boilers, pumps)
 8. Plumbing (domestic water and sanitary systems, piping, plumbing fixtures)
 9. Energy Management (temperature control and monitoring)
 10. Electrical (power, lighting, emergency generators systems)
 11. IT Network Plan (voice, data, & wireless network)
 12. Fire/Life Safety (fire alarm, fire protection/suppression systems)
 13. Security Systems (intrusion alarms, motion detectors, door locks, access control, CCTV)
 14. ADA (ingress/egress, handicapped accessibility, compatibility)
 15. Environmental/Health (hazardous materials, air quality, water, noise, etc }
 16. Compliance with Codes & Regulations (federal, state, local, ANSI, ASHRAE, EPA, etc.)
 17. Sustainability (review of facilities sustainability practices)
- A4. The PPV Asset Owner will develop the scope of services as it deems necessary. Such scope of services might be specific to the types of facilities, to the size or square footage of a property or facility, to different levels of assessments or a combination of all.

Classifications of Services (Type, Size and Level)

1. Types of Facilities:
 - a. Housing
 - b. Student Support (dining halls, athletic facilities, bookstores, theatres, student recreation, wellness and success centers,)
 - c. Instructional
 - d. Office
 - e. Utilities
 - f. Parking
 - g. Research
2. Square Footage of Property or Facility:
 - a. Class 1 – property or facility is 50,000 sf and over
 - b. Class 2 - property or facility is less than 50,000 sf but greater than 5,000 sf
 - c. Class 3 – property or facility is 5,000 sf or less

3. Levels of Facilities Condition Assessment:

- a. Level 1 - Complete Facility Condition Assessment (includes all major components).
- b. Level 2 - Partial Facility Condition Assessment (includes partial components or limited items identified).
- c. Level 3 - Systems (includes utilities, electrical, mechanical, plumbing, life safety, etc.).

A5. Facilities Condition Assessment shall categorize each cited deficiency within one of the following five (5) classifications according to the definition provided below:

1. Plant Adaptation: Expenditures required to adapt the physical to the evolving changing standards. These are expenditures in addition to normal maintenance. Examples include compliance with changing codes (e.g., handicapped accessibility) and improvements occasioned by the adoption of modern technology (e.g., the use of personal computer networks).
2. Routine Maintenance: Means the day-to-day efforts to control deterioration of facilities (keep up expenses) through scheduled repetitive activities (e.g. cleaning), periodic scheduled work (e.g., inspections and equipment adjustments) and minor repairs made on an as-needed basis.
3. Deferred Maintenance: Refers to expenditures for repairs which were not accomplished as a part of normal maintenance or capital repair which have accumulated to the point that facility deterioration is evident and could impair the proper functioning of the facility. Costs estimated for deferred maintenance projects should include compliance with applicable codes even if such compliance requires expenditures additional to those essential to affect needed repairs. Deferred maintenance projects represent catch up expenses.
4. Capital Renewal: Not 1, 2, or 3 above, regular, customary and anticipated major repairs or the replacement/rebuilding of major facility components (e.g., roof replacement at the end of its normal useful life is capital repair; roof replacement several years after its normal useful life is deferred maintenance). These repairs are typically capitalized and included in depreciation schedules according to Generally Accepted Accounting Principles (GAAP).
5. Energy Conservation Measures: Refers to expenditures for potential energy conservation projects that meet five-year payback criteria.
6. Defects due to design or construction issues.

A6. Facilities Condition Assessments (FCA's) shall prioritize all cited deficiencies by Priority Class. The five (5) priority classes shall be defined as follows:

1. Priority 1 Currently Critical (Immediate) - Items in this category require immediate action.
2. Priority 2 Potentially Critical (Year One) - Items in this category, if not corrected expeditiously, will become critical within a year.
3. Priority 3 Necessary - Not Yet Critical (Year Two - Five) - Items in this category include conditions requiring prompt attention.
4. Priority 4 Recommended (Year Six - Nine) - Items in this category represent a sensible improvement to existing conditions.
5. Priority 5 Recommended (Ten Years or Beyond) - Items in this category represent an economic payback.

A7. Facilities Condition Assessments shall be performed by a team of individuals or experts (engineers, consultants, technicians, etc.) with credentials and experience in performing facilities condition assessments, having a high level of technical knowledge and specialized skills to inspect, evaluate and document the condition of structural and system components or elements of the properties assigned. Firms shall affirm the credentials of each individual or expert performing the work and provide documentation of those credentials to the PPV Asset Owner prior to contract negotiations.

B. Facilities Condition Assessment Report (FCAR)

The Facility Condition Assessment Report (FCAR) shall be thorough, detailed documentation of all activities completed during the performance of the Facilities Condition Assessment. The FCAR shall provide valuable and useful information, data and metrics on all inspected elements that can assist the PPV Asset Owner or Institution in establishing baseline data, best practices and lessons learned and in determining future maintenance and operations funds, Replacement Reserves or alternatives for the next five years.

B1. The following is a list of informational items to be included in the Facilities Condition Assessment Report (FCAR). This list is not all inclusive but indicates the minimal information to be provided in the FCAR:

1. Executive Summary:

General information providing descriptions of property or facility, purpose and scope of the work, type of assessments, overall conditions, corrective actions, estimated costs, recommendations and analyses for short and long term replacement of deficient items.

2. Description:

Specific information about Facilities Condition Assessment that must include the following information:

- a. Unique title and project number
- b. Project description
- c. Location
- d. Building size (sf)
- e. Building age
- f. Project priority classification
- g. Building System Category (Site, Exterior Structure, etc.)
- h. Specific Building Code violation or application
- i. Specific project extent (floor wide, item only, etc.)

3. Classifications:

Class, type or level of the Facilities Condition Assessment being performed.

4. Team:

List of professionals that performed the Facilities Condition Assessment including names, position, contact information, profile, credentials and certifications.

5. Summary & Analysis:

Detailed information on all inspected areas, structural and system components including at a minimum the following.

- a. Identification of the existing condition and all deficiencies of all inspected elements.
- b. Rank and priority of all cited deficiencies by severity and anticipated life cycle.
- c. Recommendations for corrective action for any deficiencies found.
- d. Cost estimates for corrective action of any deficiencies found. Cost Estimates shall include the following information.
 - 1) Labor man-hours to correct the deficiency.
 - 2) Labor unit cost.
 - 3) Total labor cost.
 - 4) Material cost.
 - 5) Overhead and profit costs.
 - 6) Total cost to correct each line item of deficiency.
 - 7) Total cost of correction for the facility or surface area.
- e. Replacement schedule that identifies and prioritizes immediate and future replacement needs for all structural and system components.
- f. Lifecycle data and Lifecycle Cost Model.
- g. Facility Condition Index (FCI) including comparisons to other similar institutions.
- h. Capital Renewal and Replacement Plan.
- i. Current Replacement Value (CRV) or costs.
- j. Facilities Replacement Cost (FRC).
- k. Exhibits and Supporting Documentation (photographs, drawings, logs, charts, tables, formulas).

B2. Facilities Condition Assessment Reports must identify all national and local code deficiencies. Each cited deficiency must identify the particular code/chapter/section of the building standard being violated.

B3. All energy conservation opportunities within the facility must be identified as projects. The estimated simple payback in years and the annual cost avoidance must be calculated and reported for each energy conservation project. All reporting, summaries, totals, and models must illustrate potential as well as realized energy savings.