



FACILITY CONDITION ASSESSMENTS ARE JUST THE **BEGINNING**

OUR PURPOSE

- To focus on the importance of consistent and defensible FCA data as the starting point for an Integrated Asset Management Program that must go beyond just capital renewal to achieve organizational goals and objectives



AGENDA



Introduction

How Did We Get Here?

Where To Next?

The Key To It All

Q & A, Resources & Next Steps

WHAT YOU WILL GET

For Those That Have FCAs

- Provide a Road Map to move from a prioritized capital plan to an Integrated Asset Management program

For Those That Don't Have FCAs

- Develop a plan that begins with the end in mind as you build out your FCA program





HOW DID WE GET HERE?

FIRST THINGS FIRST

- **MUST** have a single source of truth for key tombstone data
 - Facility names, square footage, dates of construction, etc.
- **MUST** be speaking the same language
 - Uniformat II is the de facto standard
 - Which version are you using?
- **MUST** shared relevant data between departments if there are different owners – No More Silos!



WHY START WITH FCAS

Capital
Planning
Excellence

MOVING PAST FCAS





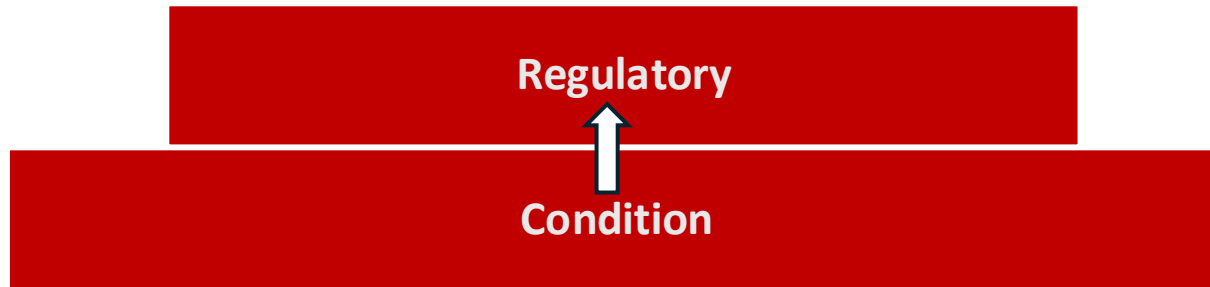
WHERE TO NEXT?

FIRST GO UP



Condition to Regulatory

- Code
- Accessibility
- Hazardous Materials
- Safety and Security

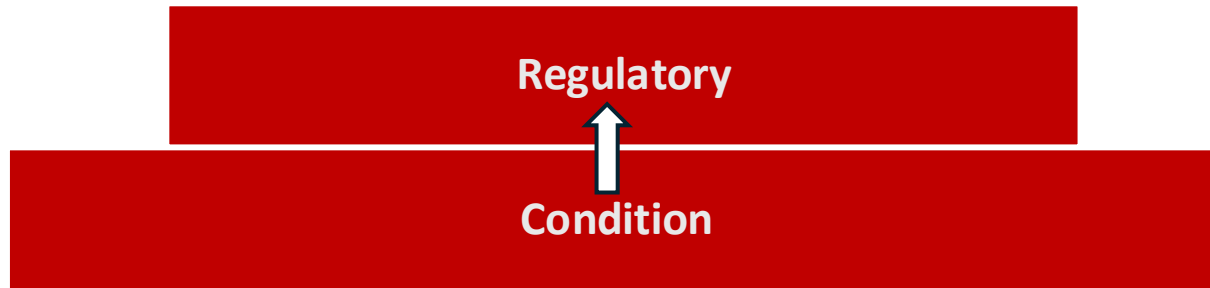


FIRST GO UP

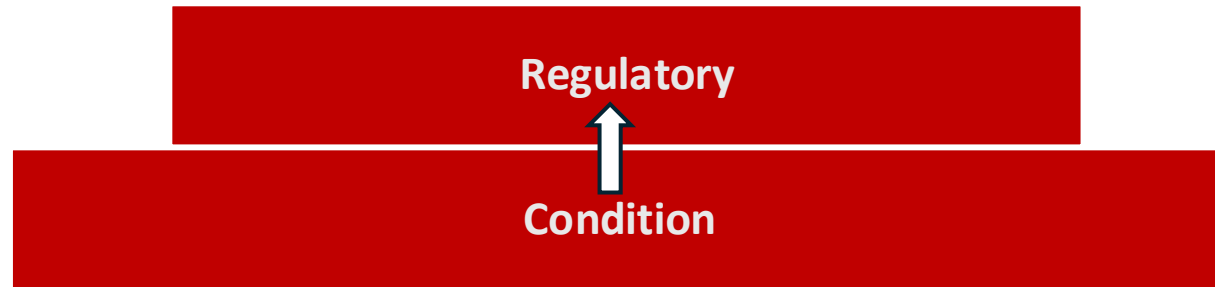


Why it Matters

- Legal requirements
 - Depends on the strength of the teeth in your region
- Real-World cost implications
- Managing risk and liability associated with Life Safety and Security
- Potential to disrupt future project work
- Can miss opportunities for synergies
- Even if you outsource, you are still responsible for compliance



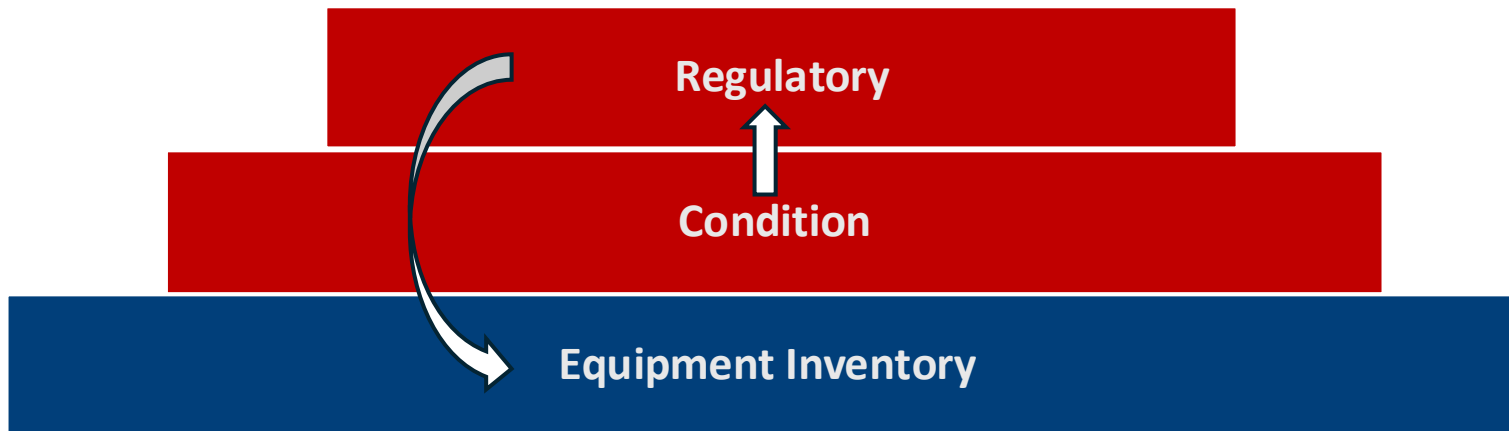
FIRST GO UP



How to Tackle It

- Separate projects
 - Integrate/translate the data
- Screening-Level Checklist
 - Tells you where to dive deeper
- Detailed Assessment in parallel with your FCA

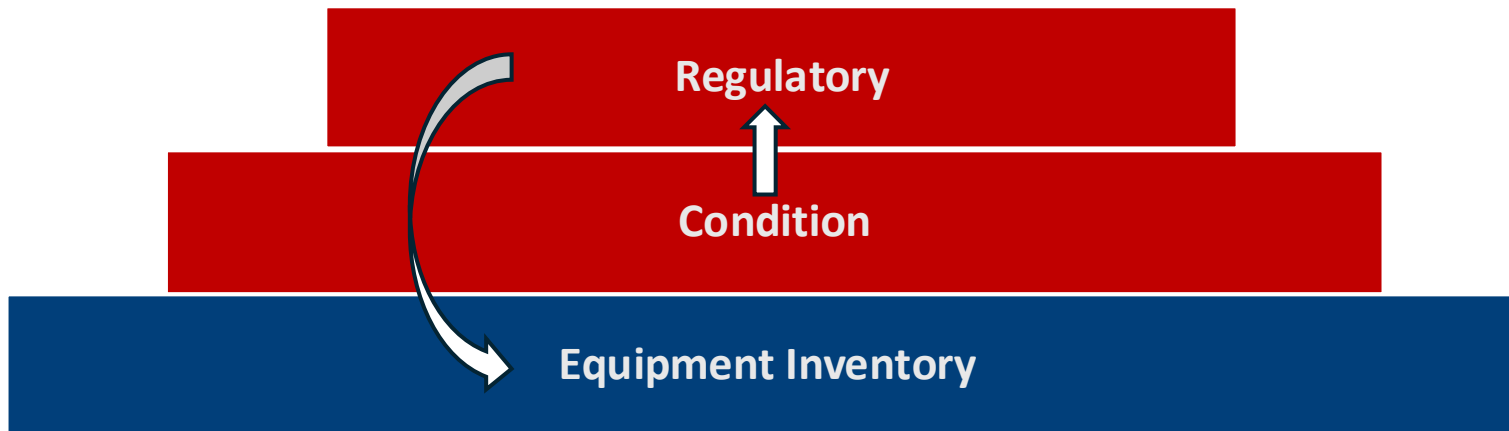
GO DOWN TO GO BACK UP



Gathering Your Inventory

- Make, Model Serial No. Location
- More focused but more granular
- Affix a Tag with QR Code and Barcode
 - Keep it Simple with Naming
- What other data do you want
 - Motor size
 - Belt size
 - etc.

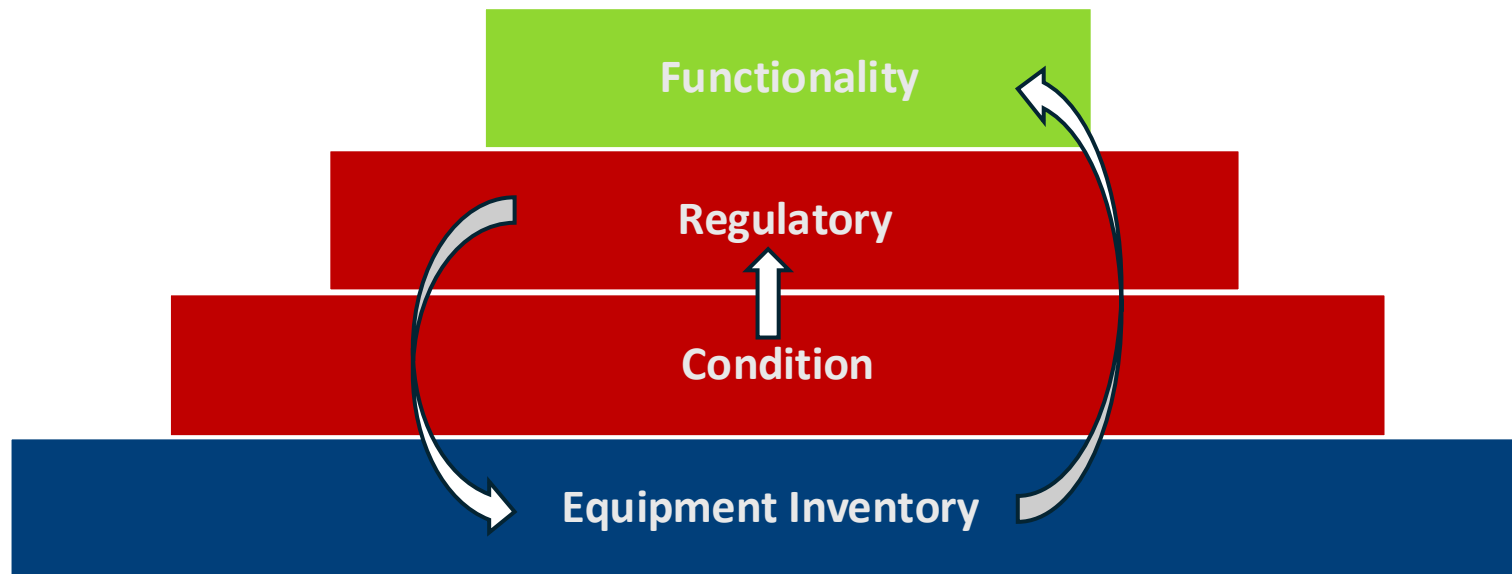
GO DOWN TO GO BACK UP



Why it Matters

- Foundation of an effective CMMS system
- Critical to development of a Preventative Maintenance Program
- Used to determine the resources that you need to manage your assets
- Meet/exceed useful life of your equipment

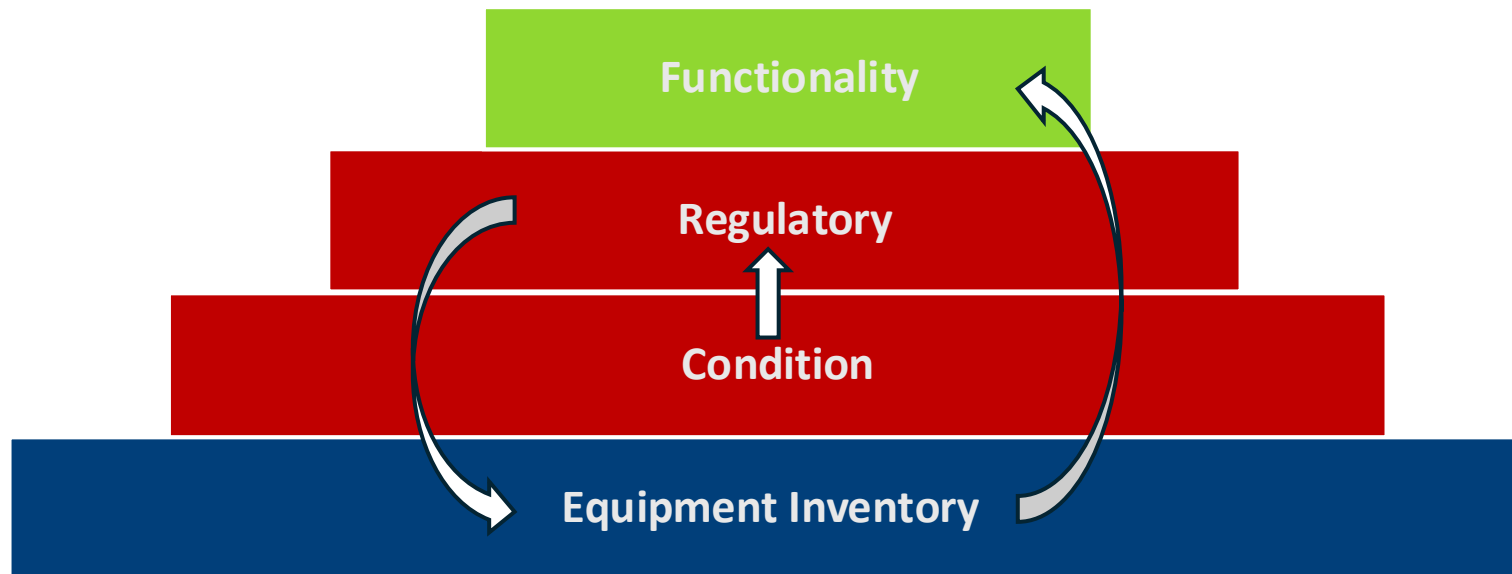
SHIFTING TO PROGRAM



Answering Three Key Questions

- Do you have the right amount of space?
- Do you have the right kind of space to deliver the programs you need
- Are you using the space efficiently and effectively

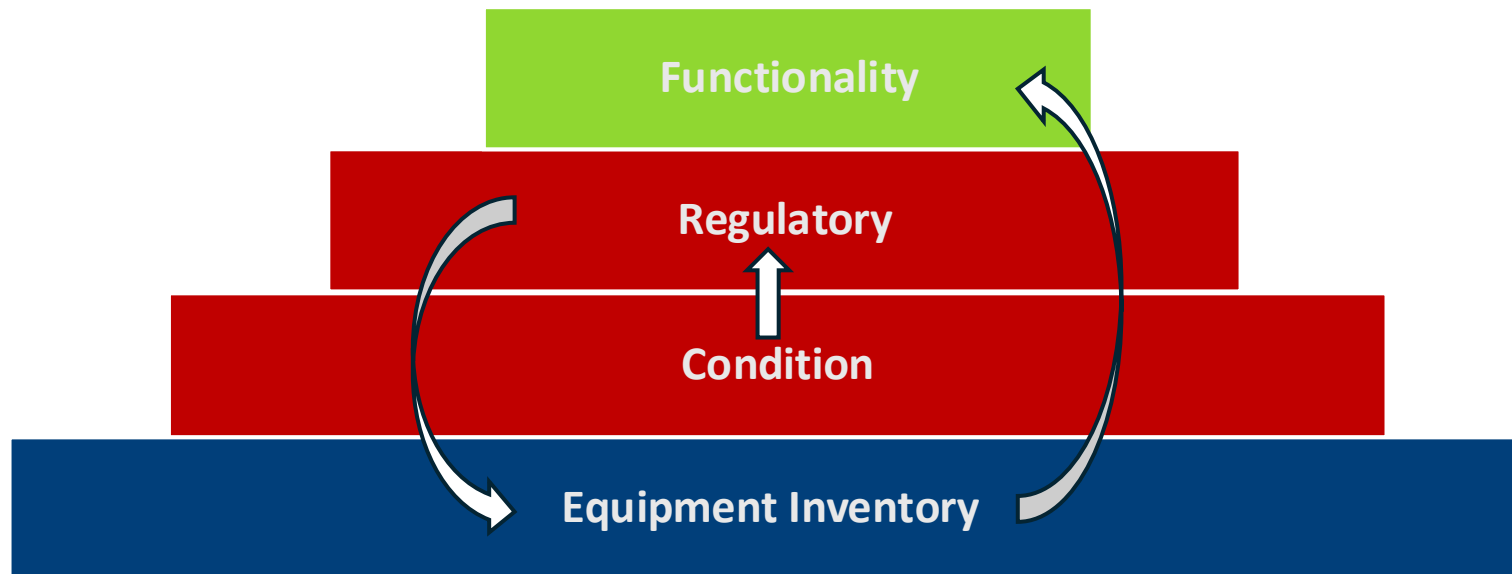
SHIFTING TO PROGRAM



Too Much Space – The Hard One!

- Wasting money maintaining and renewing unneeded space
- Right Sizing you Portfolio can be politically difficult for many
 - Divestment
 - Demolition
 - Downsizing
- Partnership with other community users to fill space

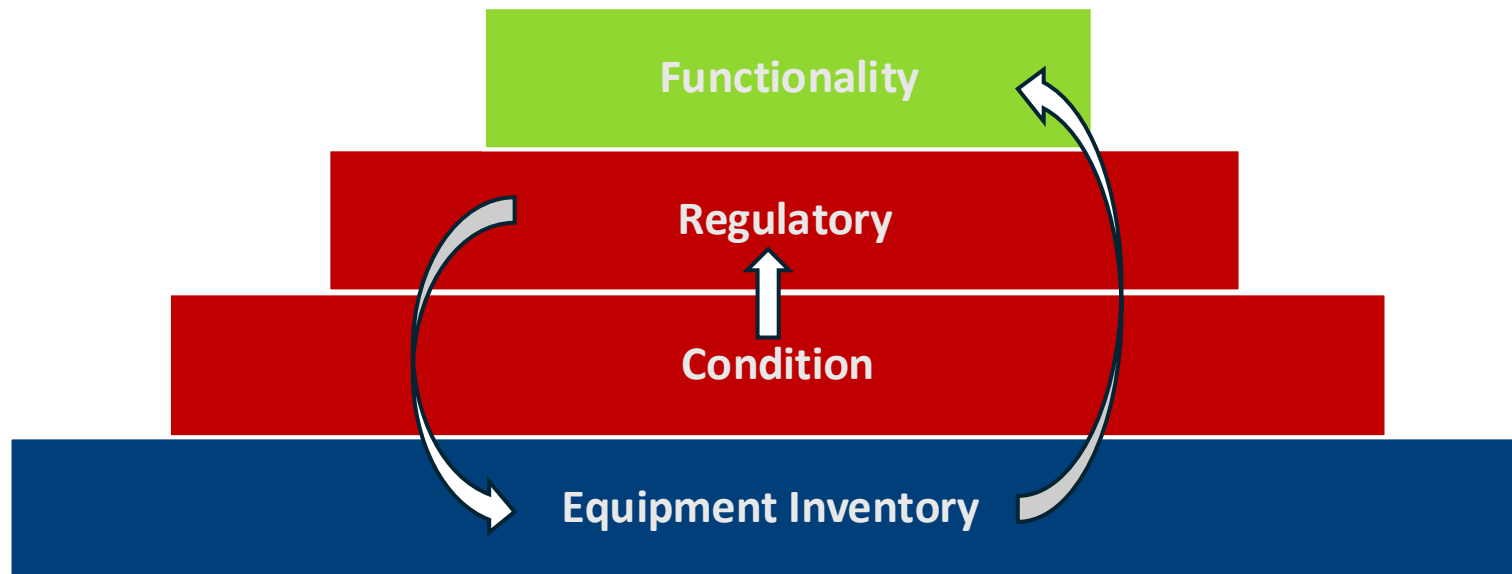
SHIFTING TO PROGRAM



Too Little Space

- Uniform across your portfolio or localized?
- Short-term or long-term need?
- Raise funds for new construction
- Find the balance between new builds (sexy) and renewal (unsexy)

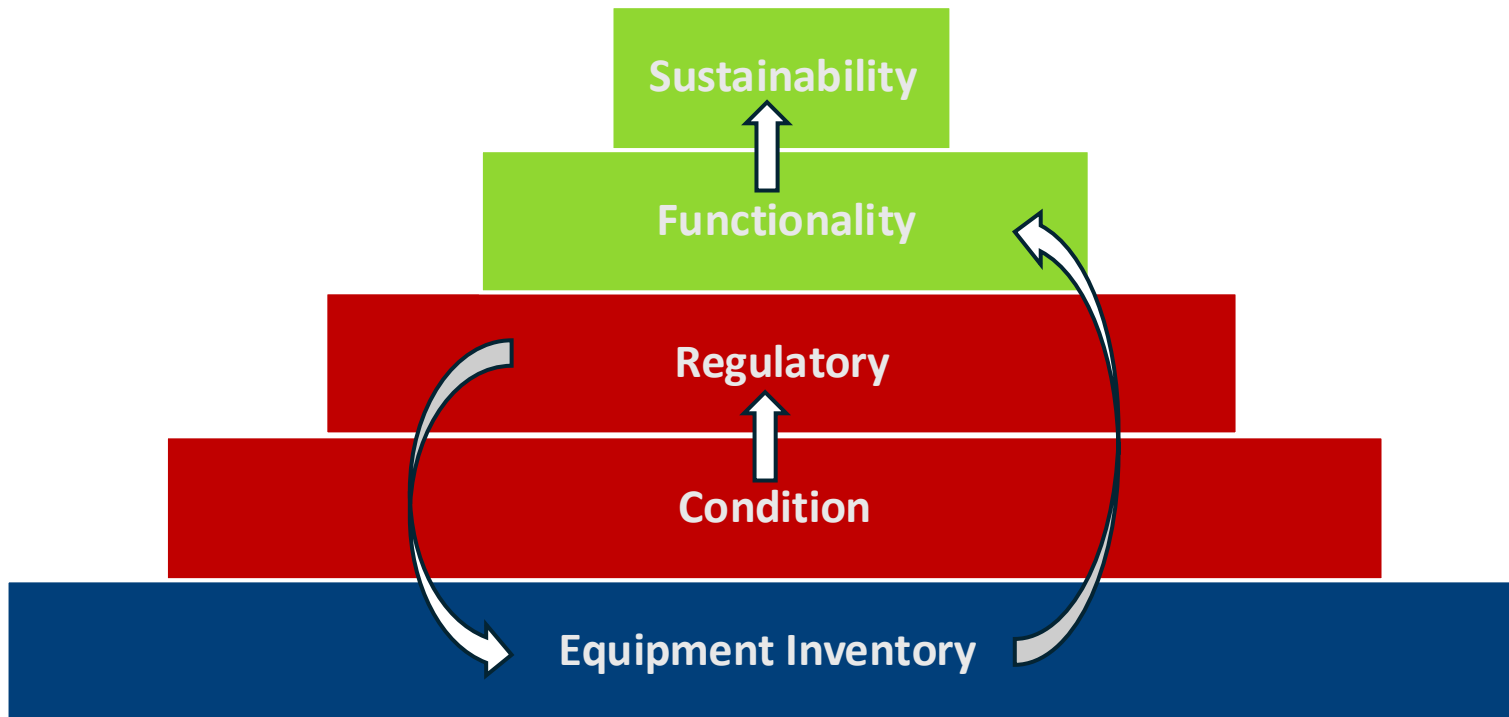
SHIFTING TO PROGRAM



Wrong Kind of Space

- How adaptable are the buildings that you have?
- What are the unique needs of your new program?
- Do you have swing space to use during renovation/reuse?

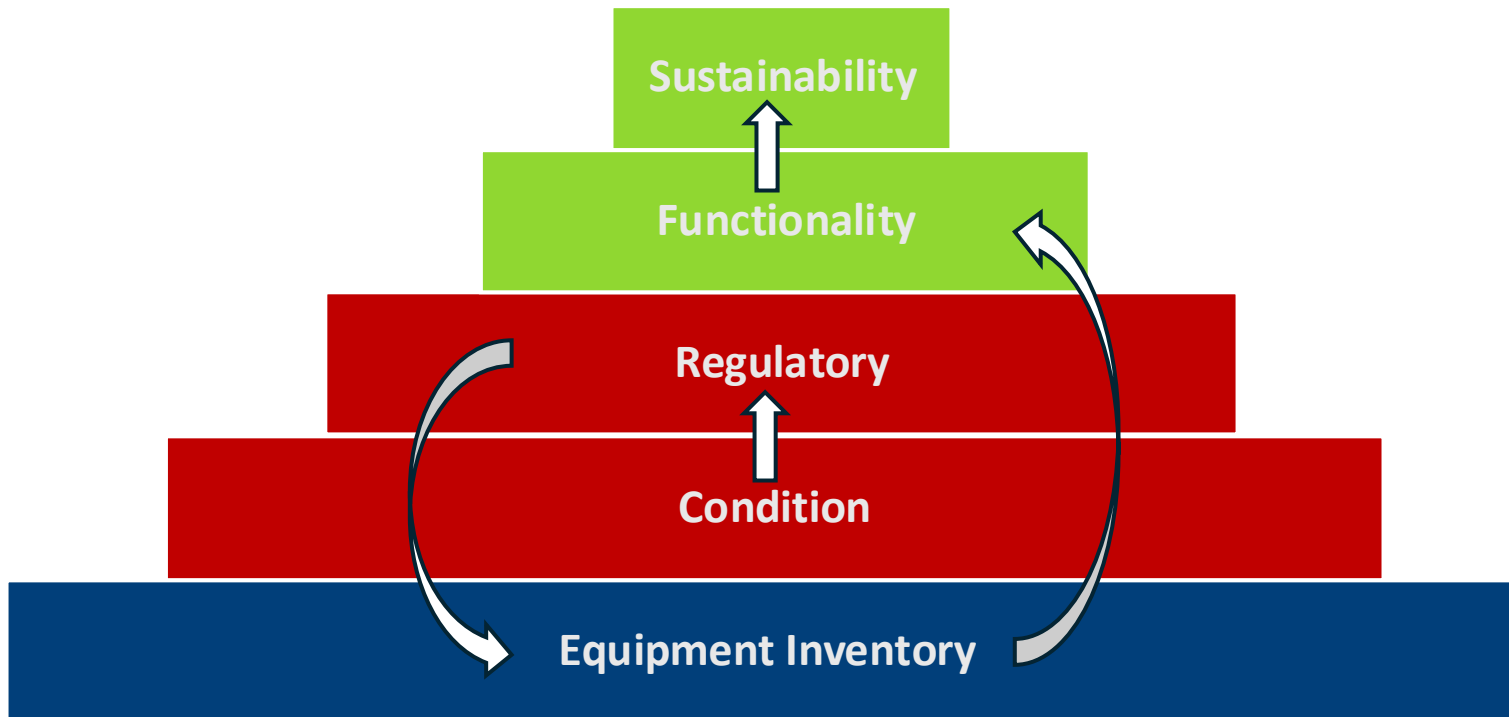
REACHING THE PINNACLE



Let's Talk Sustainability

- Energy Efficiency/Carbon Reduction
- Optimized Indoor Environment
- Properly Commissioned Systems

REACHING THE PINNACLE



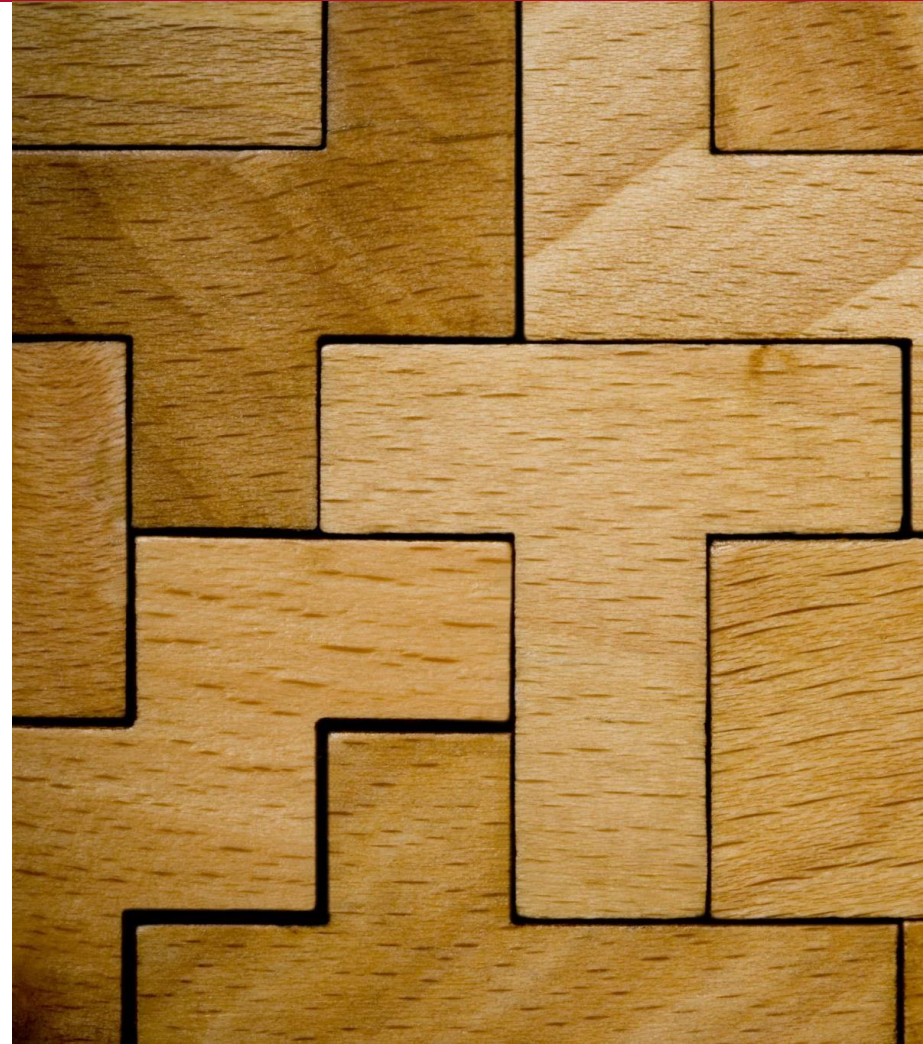
Why It's Important

- Significant cost savings
- Environmental stewardship
- Extend the life of equipment
- Improve the productivity of your occupants

BRINGING IT ALL TOGETHER

Integrate all your various needs into a single, integrated list of needs

This is still not a capital plan!!!



PRIORITIZED MULTIYEAR PLAN

- Considers all the competing needs across your entire portfolio
- Opportunity to integrate Total Cost of Ownership (TCO)
- Based on different funding sources (and restrictions) and expected budgets
- Takes into account internal resources and capacity
- Understands your local market condition





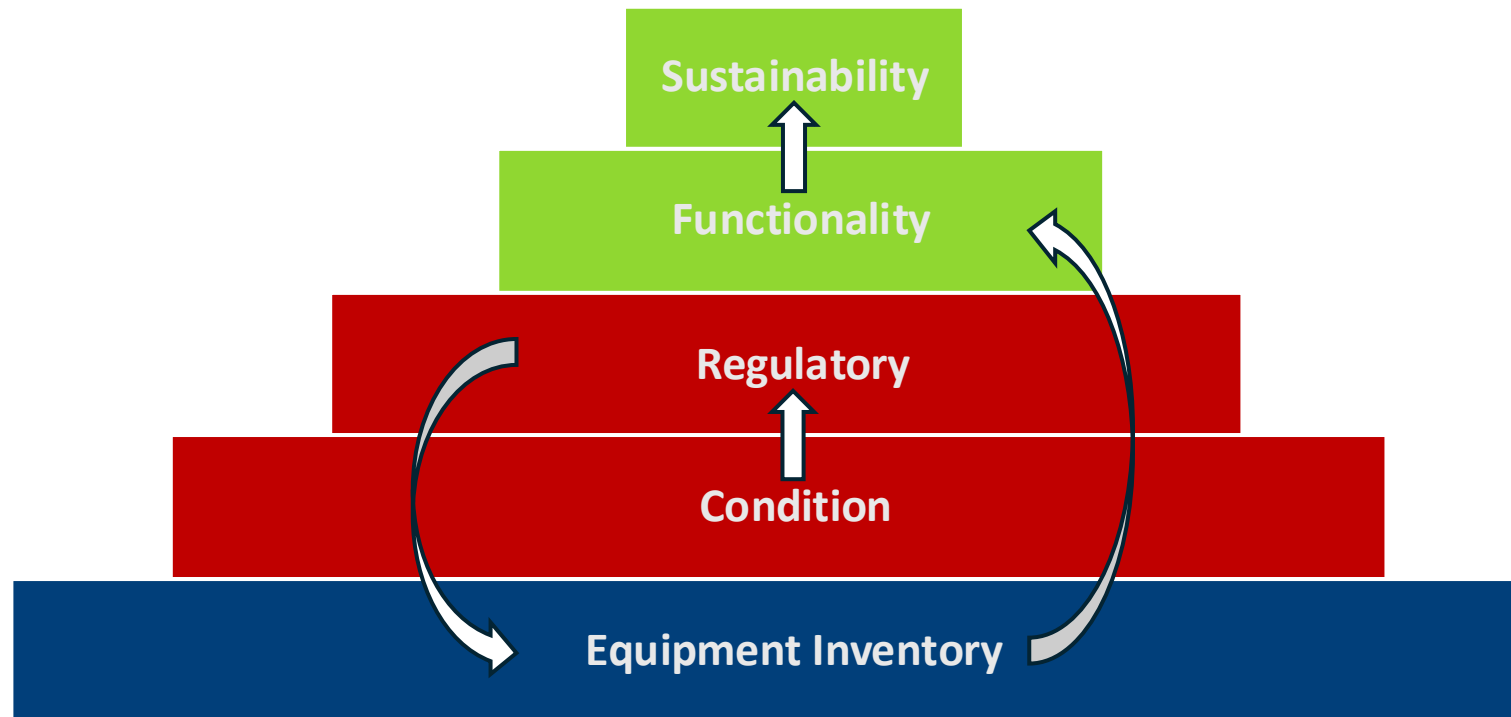
THE KEY TO IT ALL

NEED A DATA STRATEGY

- What data do you have and need?
- Who needs access to it?
- How/where will you store it?
- Who is responsible for maintaining it?
- Will it be geolocated?
- How often will it be refreshed?
- **HOW WILL YOU LEVERAGE IT TO TELL YOUR STORY?**



WRAPPING IT ALL UP





Q & A

FOR MORE THOUGHT LEADERSHIP SCAN THE QR CODE!



THANK YOU FOR ATTENDING

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The screenshot shows the Roth IAMS website homepage. At the top left is the Roth IAMS logo with the tagline "Integrated Asset Management Strategies" and small icons of the US and Canadian flags. A navigation menu includes links for ABOUT US, SERVICES, WHY ROTH, COOPERATIVES, CLIENTS, CAREERS, EVENTS & INSIGHTS, PODCAST, and CONTACT US. The main heading reads "Integrated Asset Management Strategies for Successful Facilities Management". Below this is a sub-headline: "Solving the world's Deferred Capital Renewal & Maintenance backlog crisis starts here and FCAs are just the beginning." Further down, it states: "Powered by SLAM technology, national reach, and pre-approved procurement pathways through Sourcewell, Canoe, and OECM, Roth IAMS empowers you to make data-backed decisions that are defensible and forward-focused." A blue button labeled "WHY WORK WITH US" is positioned above a large photograph of the Roth IAMS office building, which features a prominent glass entrance and the company logo on the roof.

