

# Facility Evaluation Services

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*Facility evaluation services can help clients develop capital budget plans, decide whether to sell or upgrade an owned facility, and determine if a property is suitable for purchase or lease.*

Property is always in flux. The Society of Industrial and Office Realtors estimated \$51.7 billion in nonresidential property transactions in the United States in 2002. In 2000 an estimated \$800 billion was spent on maintenance and repair and capital renewal expenses. When property changes ownership or an owner's needs change, preparation of a facility evaluation can help ensure that construction dollars or other real estate costs are expended effectively.

A facility evaluation involves examining a facility on many different levels and results in specific recommendations, with estimates of the costs associated with accomplishing them. A part of the evaluation is setting a standard or baseline against which a facility can be compared. This baseline includes a life span and minimum level of quality for building systems and major building components. Schematic diagrams illustrating recommendations can be included, although such an effort is typically offered as another level of service.

A facility evaluation can be carried out to determine any or all of the following:

- The general condition of an existing property
- The life expectancy of the major components of a facility
- Information and data required to define renovation repair and maintenance budgets
- Information needed to evaluate a decision to acquire or dispose of a property

A number of discrete services may be part of a facility evaluation. These can be contracted for individually depending on the specific needs of a project. Services frequently included in facility evaluation are described in the following text.

*Accessibility compliance*, as a stand-alone service, is commonly required as a stipulation of accepting funding to upgrade facilities such as schools, public libraries, government service centers, and other public buildings. In the private sector, the Americans with Disabilities Act and many local regulations require owners to remove barriers and generally upgrade accessibility when facilities are remodeled.

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## Summary

### Facility Evaluation Services

#### Why a Client May Need These Services

- To provide a basis for capital improvement efforts
- To help to determine future use or disposition of owned facilities
- To help in decisions to buy or lease new facilities

#### Knowledge and Skills Required

- Awareness of factors that affect market value
- Experience with construction issues
- In-depth knowledge of building envelope systems
- Understanding of construction and operating costs
- Awareness of environmental quality issues
- Familiarity with accessibility requirements
- Knowledge of building code requirements
- Knowledge of site and access issues
- Basic understanding of structural, mechanical, and electrical systems
- Information management skills

#### Representative Process Tasks

- Planning and organization
- Data gathering
- Analysis and evaluation
- Documentation and recommendations

*Code compliance*, when provided as a separate service, is usually part of a long-range plan. When an owner has long-term plans for a facility but is phasing its upgrades, code compliance and accessibility compliance are often the first level of upgrade required.

A *suitability or serviceability analysis* looks at the configuration and systems of a building; its location, site circulation, and available utilities; and nearby transportation systems, among other considerations. The purpose is to evaluate the suitability of the building for its intended use. Such an analysis, which may involve comparing several buildings, is nearly always incorporated into an architect-prepared facility evaluation.

A *building area measurement* is a detailed measurement of a facility to determine its efficiency (rentable space vs. usable space vs. gross area). While a facility evaluation may involve some amount of as-built documentation, it usually does not include detailed measurements. The Building Owners and Managers Association *Standard Method for Measuring Floor Area in Office Buildings* (BOMA/ANSI Z65.1-1996) is commonly used to make such measurements. A measurement made according to the BOMA standard is helpful in negotiating a landlord/tenant situation and would typically be performed when an owner acquires or constructs a new building intended for lease. Once a BOMA area calculation has been performed, it does not change unless major modifications are made to the building.

A *security evaluation* can often be part of a facility evaluation, but *security planning* is another level of service. A security evaluation analyzes risk using a threat assessment and makes recommendations to mitigate risk through physical and/or operational modifications. This type of evaluation is more often provided as part of facility evaluation services since the 1995 Oklahoma City Federal Building bombing and the September 11, 2001, attacks on the Pentagon and World Trade Center. These incidents have caused building owners to place a higher priority on security.

## CLIENT NEEDS

Clients may need a facility evaluation for a variety of reasons. These services are commonly employed to help a client address either periods of expansion and growth or business down cycles that cause consolidation of assets. A firm engaged in mergers or acquisitions may want a facility evaluation when existing facilities are involved. An evaluation may be called for following accidents or disasters (e.g., fires, earthquakes, and floods), or when a property is located in an area affected by urban renewal, neighborhood revitalization, or development of a historic district. The reallocation and redistribution of resources by the client or changes in service they provide can also drive the need for facility evaluation.

## Facility Evaluation Examples

The following examples of actual projects illustrate how facility evaluations were used to support several kinds of client facility programs and needs.

### *Support for a Long-Range Plan*

A manufacturing client had purchased a piece of property in an industrial park near the company's current manufacturing facility. The long-range plan was to construct a 250,000-square-foot office/manufacturing facility on the property, with future plans to build a second facility of the same size. The addition of these two buildings would ultimately quadruple the company's office and manufacturing area. This was critical, as their existing manufacturing operation could not handle current demand, let alone the projected demand. But even with a fast-track design/construction process, the new buildings would have taken 18 months to come on-line, and the company needed to increase its manufacturing capacity much faster.

Looking for other options, the company researched the availability of existing facilities in the industrial park that could quickly accommodate a temporary manufacturing facility. Facility evaluations were prepared for two suitable buildings. Although comprehensive, these evaluations focused on factors that would affect the company's ability to get its manufacturing lines up quickly. In this case, the following factors were of primary concern:

- Ceiling height and column bay spacing available to accommodate equipment
- Ability of the roof structure to accommodate overhead cranes
- Loading dock capacity
- Availability of natural light on the manufacturing floor (this was important to the company's culture)

The facility evaluation also included information regarding lost revenue provided by the client and estimated construction costs prepared with the assistance of a contractor.

As a result of the facility evaluation, the client determined that with minor upgrades, one of the buildings could accommodate a portion of its operations immediately. The building was evaluated, purchased, retrofitted, and occupied within three months. As a result, the company was able to realize 15 months of revenue that would not have been possible otherwise.

### *Support for Cost Decisions*

A company in a downtown setting was planning to expand its existing 50,000-square-foot headquarters office to a facility of 120,000 square feet. In addition to increased size, the image the expanded facility would project was important to the company.

During the company's citywide site selection process, the 66,000-square-foot building next to the headquarters became available. With construction of a 5,000-square-foot connection between the two buildings, the company's planned expansion could be accommodated. However, because the available building did not project the desired image, the company planned to demolish it and build a new one in its place.

The board of directors decided this solution seemed wasteful and might be perceived negatively by employees and the public, so the company was required to perform a cost-benefit analysis for the existing building. Three levels of upgrade were priced so the cost of demolishing the building could be evaluated against the cost of building a new building. The first level included the minimal upgrades required by code and accessibility requirements. The intermediate level included more extensive remodeling of the interior spaces. The last level included gutting, remodeling, and recladding the building to upgrade it aesthetically. None of the levels could compensate for the fact that the floor-to-floor heights of the two buildings did not align, presenting functional problems that could not be corrected. A contractor provided the estimates.

The company ultimately decided to demolish the building, but the facility evaluation and pricing provided a logical as well as a functional basis for the decision. The company was able to support its plans with quantitative evidence, and the board supported the decision. Design of a new building that appropriately reflects the company image and provides new space intended to accommodate their functional program is proceeding.

## Services Related to Facility Evaluation

Although seldom part of a facility evaluation, the following services could stem from or be performed in conjunction with a facility evaluation.

**Postoccupancy evaluation (POE)** services are typically performed by the architect of record, who knows the program requirements as well as the reasoning behind design decisions for a recently constructed building. A POE is an opportunity for the architect and the owner to evaluate how well the building meets the needs of its users. This information can be used to improve planning and design on future projects and can help solidify an existing owner/architect relationship.

**Expert witness services** can assist a client during a lawsuit or arbitration. An expert in a particular building type is usually called upon to comment on a specific element or aspect of a facility completed by another professional (e.g., building envelope design or code compliance).

**Facility management (FM)** is another related service that architects can provide. Some clients may already have internal FM capabilities. Those that don't may be motivated to have FM services after a facility evaluation is completed. This would be especially true for clients with extensive property holdings, since data compiled on multiple facilities can be uneven when a rigorous FM approach has not been applied.

### *Support for a Capital Improvement Plan*

A public school system was developing an incremental capital improvement plan for all the school buildings in its district. A facility evaluation was prepared for each of the 29 school buildings built between 1922 and 1975 to identify and prioritize needed improvements. The evaluation included roofing, building envelope, systems, and energy analyses. A specialized roofing consultant was part of the team, and cost estimates were provided by the architect-engineer (A/E) team.

The analyses helped the district identify and price levels of improvement that could be implemented over several years. The first phase included accessibility upgrades. The second phase included roof repair, window replacement, and air-conditioning for classrooms. Classroom technology was to be upgraded in a subsequent phase. The remaining items were prioritized and will be implemented as funding becomes available.

The facility evaluation effort enabled students and staff to enjoy incremental upgrades and allowed the district to manage its budgets and enhance its bonding capacity. The school district was also able to use information from the evaluations to justify decisions to constituencies who may have questioned its priorities.

### *A Basis for Lender Financing*

Due to a decrease in the market demand for their product, a telecommunications firm abandoned a building project before it was finished. The building shell was completed, and the interior was tempered to protect the in-place material and systems. Never occupied, the structure had been empty for two years when another manufacturer expressed interest in purchasing it. Since the building was not complete, it was difficult for the lender to assess the value.

A facility evaluation was prepared that focused on the value and condition of the envelope and the additional work required to occupy the building. The evaluation included comparing the constructed facility to the original construction documents and determining the cost required for completing the facility to the standards of the potential owner. A real estate consultant hired by the owner provided the market value evaluation, which enabled the lender to assess the value based on market value less the cost to complete the structure.

## **Acquiring Facility Evaluation Services**

Clients acquire facility evaluation services in much the same way they acquire standard A/E services. In fact, for facility evaluations, they typically employ an architect with whom they have an established relationship. This arrangement is convenient because timing can be critical in facility evaluations. Sometimes there is no time for the client to prepare a request for proposal (RFP) or go through an interview process.

Often, facility evaluation is provided as a stand-alone service—particularly for a public client or when fund-raising is involved. The evaluation may be prepared as a basis for making decisions, with funding or further approval needed before the project can move forward.

Many times, however, a facility evaluation is combined with other A/E services. It may be part of a site selection process. Sometimes it results from postponement of a building project, which requires an interim solution. At other times, a facility evaluation may be coupled with predesign services that proceed directly into schematic design, design development, and construction documentation services.

Of those who offer facility evaluation services, architects bring the most holistic understanding. Nonetheless, many other types of firms also offer these services. Contractors, builders, and subcontractors can identify and price required repairs, but their motivation for doing so is often to procure a construction project. As a result, they may not be as inclined to help a client think through alternative solutions. In addition, most contractors do not have the expertise to evaluate whether a facility can accommodate specific program requirements.

Building specialists can evaluate particular building components, such as roofing, elevators, and security systems. If specialized expertise is required, these consultants are often included as part of an A/E facility evaluation team.

Inspection services available for both residential and commercial properties are commonly used prior to purchase of a property. Inspectors give a general, comprehensive overview of a property, based upon a financial approach. They do not typically offer solutions for fixing identified problems, nor do they have the expertise to evaluate whether a facility can accommodate specific program requirements.

Management consultants sometimes offer facility evaluation services as part of a consulting package. Their sales pitch as a “one-stop shop” for services and information is alluring, and they may already have the interest of upper management due to prior relationships or reputation. Sometimes such consultants have in-house capability to evaluate properties, but often they subcontract the work to others, including architects, mark up the costs, and bill the owner.

Some companies developing and offering facility assessment software also provide facility assessment services, which are integrated with Web technology. This software has a rigorous structure that enables highly detailed tracking of data. These programs and services are most useful for clients that own and maintain a substantial number of facilities, making the preparation of individual assessments cost-prohibitive. Such assessments will require some interface between software and data such as combining an adequacy assessment with a facility condition assessment or between assessment software and management software.

## SKILLS

The skills and knowledge needed to prepare a facility evaluation are not unlike those needed for traditional architectural services, but the process of applying that knowledge is different. Rather than interpreting a program in order to design a building that sup-

### Facility Evaluation Factors

A facility evaluation considers both *quantitative* and *qualitative* factors affecting the suitability of a facility for its intended use. The most basic of these is square footage analysis and comparison. Other kinds of quantitative questions that might be answered in a facility evaluation include the following:

- Do large columns and tight bay spacing limit efficiency? If so, the net to gross for the area multiplier must be increased.
- Are floor plate sizes conducive to the program? If too large, can they be broken up with light wells or other physical elements? If too small, can additional communicating stairs be added to integrate departments?
- Can the facility accommodate specialty systems such as studios or manufacturing equipment?
- Can floor-to-floor heights accommodate equipment needs, access floor systems, ductwork, lighting, sprinklers, and data? What is the depth of the floor sandwich, and how can systems be accommodated?
- Can the structure accommodate special loads for heavy storage and manufacturing?
- Can the structure withstand vibrations from outside traffic? from interior equipment?
- Are existing building mechanical and electrical systems reusable/replaceable?
- Is the site location, its circulation, utilities, and so on adequate for the intended use?
- Beyond the quantifiable needs that help determine whether a facility can accommodate its intended use, a facility evaluation may consider issues of a more qualitative nature, such as these:
  - Contextual value
  - Historical value
  - Environmental goals
  - Security goals
  - Daylighting and spatial quality
  - Spatial relationships and adjacencies
  - Aesthetic goals and image desired by the client

ports it, an architect performing a facility evaluation must determine whether an existing facility is able to support the use the owner intends. To make this determination, the architect applies experience gained working with clients to meet their facility needs.

## Understanding of Factors that Affect Market Value

A facility evaluation must include the effect of required upgrades on the market value of the facility. Will the upgrades cost more than the ultimate market value of the facility, or will they significantly increase the market value? Location is often the defining factor in answering these questions.

A return on asset value analysis (ROA) can yield detailed, quantitative information useful for determining effects on the market value of a property. Factors considered in such an analysis include investment costs, investment benefits, present value of benefits, and present value of costs. Since most architects are not skilled in ROA analysis, MBAs on the team (in-house or consultants) can fill this gap.

## Knowledge of Construction Methods

A good knowledge of sequencing and staging is necessary when recommending repairs, as often the client can only do a portion of the upgrades. The architect evaluating a facility must be able to see what makes the most sense from a sequencing perspective in light of which systems have the shortest life spans. The availability of the required labor and craftsmanship may also affect what kinds of recommendations are made, particularly for historic structures.

## In-depth Knowledge of Building Envelope

Technical knowledge of building envelope systems makes it possible for the architect to determine the useful life of system components and to identify required repairs. This information also makes it possible for the architect to communicate to the client the urgency or seriousness of a recommended repair. System components considered during envelope analysis include the following.

**Curtain wall/window systems.** Window and curtain wall technology has changed dramatically over the past 50 years. Nonetheless, moisture penetration, air infiltration, rust of steel systems, and rot in wood systems are still common problems.

**Brick and stone.** Although these materials have a long life span, repair or replacement is often required due to spalling or moisture penetration. Checking mortar joints and expansion joints may reveal the need to tuck-point or repair caulking. Instances of anchorage failure also must be addressed.

**Wood.** The need for painting is usually obvious, but it is important not to overlook potential rot and to determine whether portions of siding, soffits, or trim should be replaced.

**Roof.** The age, slope, and construction of the roof must be examined, specifically to determine if the roof has sufficient drainage and the roof penetrations are adequately flashed.

## Understanding of Operating Costs and Energy Efficiency

Local utilities often have loan or rebate programs that can be useful when a company performs upgrades that increase energy efficiency. The ability to find answers to questions such as the following can make it possible to save the client operating costs:

- Are the windows thermally broken, operable, insulated?
- Is there adequate insulation in the walls and roof?
- Do mechanical or electrical systems need to be upgraded?
- Are the ceilings excessively high, or are there cavernous spaces larger than what is used or needed?
- Is the facility able to meet current energy codes?

## Awareness of Issues Affecting Environmental Quality

Surveys for the presence of asbestos and lead paint are necessary and should be carried out by a specialist. A specialist may also be needed to address mold problems. It is important for the architect to be able to determine the potential for mold in mechanical ducts and exterior walls and to know when a specialist is needed.

## Familiarity with ADA and Local Accessibility Codes

When an existing facility is renovated, it is necessary to comply with requirements of the Americans with Disabilities Act as well as any local accessibility codes. Common issues that need adjustment include the following:

- Accessible route requirements
- Clearances and heights for plumbing fixtures
- Counter and equipment height, such as transaction counters and telephones in public spaces
- Requirements for accessible seating in auditoriums
- Ramp requirements (slope, handrails and guardrails, surface material requirements)
- Elevator requirements

## Experience with Building Codes

Part of a facility evaluation is verifying applicable codes with local building officials and determining to what extent the facility must be upgraded to meet these codes. Upgrade requirements are typically based on the level of improvements proposed, changes in occupancy type, and the extent of good faith efforts proposed to improve building safety. Items that commonly need upgrading include fire separations, rated corridors, and stairs (sealing penetrations, replacing doors); exits (width and access); and fire sprinkler systems.

## Knowledge of Site and Access Issues

Architects providing facility evaluation services must be able to evaluate how information about site and access issues affects the suitability of a facility for the client's needs. Questions such as the following will help the architect gather the necessary information:

- Can the site accommodate the client's loading and delivery requirements?
- Can the site accommodate public and private entrance requirements?
- Can the slope of the site accommodate special vehicles?
- Is there adequate drainage?
- Is the traffic flow required by the client possible on the site?
- Is there adequate parking for the proposed use?
- Can the site accommodate turning radii of large vehicles?

## Basic Understanding of Structural, Mechanical, and Electrical Systems

When substantial revisions are expected, or a structure is deteriorating, experienced architects are accustomed to enlisting the expertise of engineers. Because they work frequently with these specialists, architects are conversant in their terminology and will be able to apply their reports to the facility evaluation.

*Structural engineers* can better evaluate the appropriateness and condition of a structural system. In addition, they can evaluate any structural changes required for a change in use, such as the addition of openings or substantial changes in load requirements.

*Mechanical engineers* are consulted to evaluate HVAC, plumbing, and fire protection systems with regard to type, age, condition, efficiency, and ability of the existing

system to accommodate new uses, particularly if there are extensive requirements for manufacturing, lab, food service, or other specific program elements.

*Electrical engineers* are required to evaluate the condition, capacity, and appropriateness of the power supply, distribution system, and service size; the need for emergency power (generator and UPS capacity); and the need for upgraded lighting systems to support proposed use or to increase efficiency.

In addition to these engineers, specialty consultants may be required to supplement the skill of a typical architect. Architects should be able to discuss a facility with these experts and be knowledgeable enough to incorporate their reports into the facility evaluation. Several such consulting services are discussed in the following paragraphs.

**Vertical movement systems.** An elevator specialist evaluates existing elevators for their ability to meet current elevator codes, estimates the life span of the equipment, and determines the elevator's ability to meet the vertical flow required by a proposed building use.

**Security systems.** An architect can comment on the basic security concept for a facility, but a security specialist will be able to evaluate and recommend the specific technology and equipment necessary to implement the concept.

**Data/communications.** Distribution of data/communications system cabling throughout a building can be critical to an owner, and thus the owner often has in-house communications expertise. If not, a specialty consultant is typically needed.

## Information Management Skills

Information management, including data aggregation, correlation, and analysis, along with database development and administration, are helpful tools for an architecture firm providing facility evaluation services. If the firm is not large enough to have someone with these skills on staff, it may be necessary to hire a consultant to help compile the data for a facility evaluation.

## PROCESS

A facility evaluation contains a variety of tasks within several phases of work that normally include planning/organizing, data gathering, analysis/evaluation, and documentation. Before the work begins, the architect and the owner should agree upon the purpose of the facility evaluation and define the goals and objectives of the services. This discussion can flow from questions such as these: What decisions does the owner want to make as a result of the report? What issues must be addressed in order to make these decisions? Which factors are most relevant in making these decisions?

If the client and the architect carefully define and agree upon the scope of services, compensation can be based on a fixed fee or a cost not to exceed. Working on an hourly basis is desirable if a client has a constantly evolving scope; however, getting an owner to agree to this is often difficult. An alternative is to offer hourly billing with a guaranteed maximum cost. As with all architectural services, it is important for the scope to be specific so additional services can be proposed and justified when necessary.

### Items That Affect Scope and Fee for Facility Evaluation

- Level of detail for the study
- Size and location of the facility
- Complexity of the construction type
- Number of options to be reviewed
- Access to drawings or preparation of as-built documents
- Availability and completeness of program statement
- Clarity of the objectives for the evaluation study
- Schedule and timing

## Planning/Organization

Assemble a facility evaluation *team* based on the goals and objectives identified in the scope of services. After identifying in-house capabilities, select other team members with the range of skills needed. After determining what resources the client can provide, engage consultants and specialists as required to supplement available team resources.

Develop a *work plan and schedule*. Identify information the owner will provide and when it must be received. Include a list of drawings the owner has agreed to provide, a list of contacts the owner needs to make, and milestones for decisions the owner needs to make. Establish the completion date with the client, based on when they need to present the results of the facility evaluation or when they need to make a final decision. Determine if the information is required for a capital campaign deadline or if the decision needs approval from a board of directors or other governing body. Prepare an outline for your report and review it with the client. This is a good time to verify if your report will meet the owner's expectations.

## Data Gathering

A comprehensive data-gathering step will enable structured information to be obtained during walk-throughs and subsequent interviews.

An initial *walk-through* of the building with the entire team is a good way to kick off a project. If possible, floor plans should be available to the team for note taking. Follow-up trips can be set up to allow individual team members to examine specific details, but it is important for everyone to have the opportunity to see the facility together.

Identify individuals who can supply valuable information about the facility, and plan to *set up interviews*. Access to the building engineer can be very important. Many times this individual is the most familiar with a facility and can promptly identify problems and issues. Any issues that arise can then be substantiated with other research. Other users can help you understand relevant business operations.

Obtaining *existing documentation* is critical. Sources other than the owner for this information include local or other government agencies, the architect or engineer of record, the architect or engineer of additions or renovations, past owners, the original contractor or the contractor for additions or renovations, or a historical society. Having access to building plans, elevations, and details for all disciplines and specifications can make the evaluation process much more effective. In addition, access to design efforts that were not implemented is often very informative. As an additional service, the architect may establish CAD and database standards for the owner.

Operation and utility maintenance *records* are important for the mechanical and electrical engineers. These can be obtained from the owner, past owner, or utility companies.

*Photographs* are an important part of the finished document, but they can also be very helpful in the analysis process. Photographs processed from film can be scanned for use in the report, but using digital cameras makes it possible to download photographs directly into the report document.

If a client is currently using *assessment software* programs (such as VPA or 3DI) or *management software* tools (such as Archibus or Aperture), detailed reports can be compiled for use and inclusion in the evaluation.

## Analysis/Evaluation

The goal of the analysis/evaluation phase is to arrive at a set of findings or recommended actions. This is accomplished by organizing data collected during the previous phase and then considering that data within the context of project requirements, budget, and schedules measured against a comparative baseline or benchmark.

Existing project data is typically organized by major building systems, similar to a schematic design narrative. This includes a summary description of each system, followed by an evaluation of it. Recommendations can be included in this section, but it is sometimes clearer to have a separate recommendations section.

*Establish a baseline* from which to evaluate the facility. The baseline may be another facility with which this facility is being compared or another facility, new or renovated, that the client owns or occupies. (Typically, a standard or baseline is established for a facility to be compared to, for example, a 20-year life for major systems and components and minimum levels of quality.)

Include a *summary of the building program* to be accommodated.

Identify and prioritize *needs and opportunities*. Indicate if the client has an investment threshold or requires a minimum return on investment.

The *cost estimate* for improvements is an important piece of the report. It should be concise but must contain enough detail to be clear. Cost estimates can be prepared in-house or by a contractor or a cost-estimating service. These estimates are often based on square footage costs and include a contingency.

If cost estimates are provided for multiple options, it is critical that they be easy to compare. Assumptions and exclusions should be clearly noted. Estimates should show a minimum–maximum range of costs and should allow for differentiation between deferred maintenance, capital costs, and upgrade costs to meet new programmatic requirements.

*Develop recommended actions* based on the client's goals as identified at the outset. If a client will use the facility evaluation to decide whether to purchase a facility, recommendations should recognize modifications needed to accommodate the program use as well as required systems modifications. Note the recommended upgrades and modifications and any follow-up evaluation that should take place. If a client is considering a new use for an existing facility, include advantages and disadvantages as part of the recommendations. Recommendations should be weighed against other options the owner has, such as selling versus leasing versus upgrading.

## Documentation

The results of a facility evaluation are usually presented in a report format (8" x 11" or 11" x 17"). Although the organization of the document may vary depending on the client's needs, a simple, three-part document is the most straightforward.

An *executive summary* of no more than three pages should begin the document. It should include the goals and objectives of the facility evaluation, a brief summary of building conditions and history, line item recommendations, and a cost summary.

The *body of the report* elaborates on the information in the executive summary and supports its conclusions. The report includes a building history (when the building was built, with the dates and scope of additions and renovations; a list of previous and current owners and uses, including occupancy dates; and major changes in context, including road reconfiguration, neighborhood, etc.), a summary of existing conditions and an analysis organized by building systems, key drawings (plans, sections, and elevations) and photographs, the cost estimate, and a summary of recommendations with drawings.

An *appendix* should include information gathered that supports the information in the report body. Relevant material might include reports from consultants, additional photographs of the building, cost estimate details or backup information, a detailed building program, and an economic analysis showing rate of return between selected options.

The document should be delivered to the owner in draft form, with time allowed for review and comment. After comments are incorporated and the final report delivered, as in all services, it is important to follow up with the client. Did the report allow them to make the decisions they were hoping to make? What decisions did they make? Is help with any follow-up steps required?

## A CONTINUING NEED

The need for facility evaluation services exists regardless of where the economy is. If markets are in an expansive mode, clients are usually looking to acquire additional real estate to accommodate growth. If the economy is in a recessive mode, clients are looking to sell off real estate as they consolidate their operations and assets. In either of these situations, thorough facility evaluation helps clients to take thoughtful courses of action.

Because of their holistic outlook and their ability to facilitate expert teams, architects can provide effective and valuable facility evaluation services. Drawing upon past projects to illustrate concrete results, architects can put recommendations into terms that a client can readily understand.

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The AIA provides a contract document designed especially for alternative architectural services.

**B102–2007, Standard Form of Agreement Between Owner and Architect without a Predefined Scope of Architect’s Services.**

AIA Document B102–2007 is a standard form of agreement between owner and architect that contains terms and conditions and compensation details. B102–2007 does not include a scope of architect’s services, which must be inserted in Article 1 or attached as an exhibit. Special terms and conditions that modify the agreement may be included in Article 8.

The separation of the scope of services from the owner/architect agreement allows users the freedom to append alternative scopes of services.

AIA Document B102–2007 replaces and serves the same purpose as AIA Document B141–1997 Part 1.

For more information about AIA Contract Documents, visit [www.aia.org/contractdocs/about](http://www.aia.org/contractdocs/about)

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