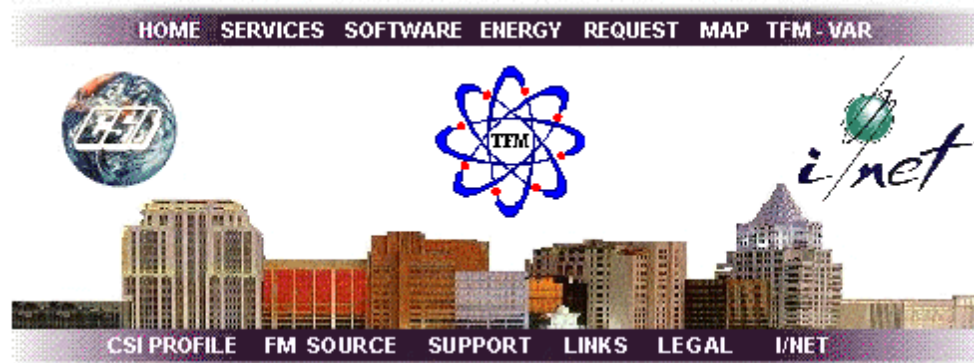


# *Technical Facility Management* **FACILITY CONSULTING SERVICES**



## *The Facility Audit Program*

*TFM Audit Program - Schedule*

Customer: \_\_\_\_\_

Dates of Visit: \_\_\_\_\_

AREA	TFM	CUSTOMER	SUBJECT	PRE-VISIT	Day 1	Day 2	Day 3
Goals/Objectives			Review business objectives.				
			Identify key facility issues.				
			Understand organization structure.				
			Discuss acceptable solutions.				
Schedule Key Interviews			Facility Manager				
			Plant Operations & Maintenance Manager				
			One Maintenance Mechanic				
			Project Manager				
			Janitorial Manager				
			Landscape Contractor				
Facility Tour			Tour main facility.				
			Tour satellite facilities.				
Organizational Structure			Review in-house skill levels, wage scale, union issues.				
			Review managers/supervisors/hourly ratios.				
			Understand division of responsibility.				
			Review training, career pathing, turnover.				
Budgeting/ Reporting			Review reporting system.				
			Understand process for monitoring expenditures and variance reporting.				
Work Order System			Review work order system, process, reports.				
			Review customer service, dispatch process.				

*TFM Audit Program - Schedule*

Customer: \_\_\_\_\_

Dates of Visit: \_\_\_\_\_

AREA	TFM	CUSTOMER	SUBJECT	PRE-VISIT	Day 1	Day 2	Day 3
Maintenance & Operations			Understand unique facility requirements.				
			Review preventive vs. responsive work orders.				
			Review electric services and lighting.				
			Review HVAC systems.				
			Review environmental and life safety operations and maintenance procedures.				
			Review sprinkler system.				
			Review fire protection.				
			Review elevators				
			Review trash removal and recycling.				
			Review parking lots and roads.				
			Review pest control.				
Contract Administration			Identify services contracted.				
			Review key contracts, benchmark to market.				
			Review contract bid process and controls.				
Materials Mgmt			Review role in contract services specs/bids/negotiation.				
			Review role in purchasing supplies.				
Security			Review security strategy.				
			Review organization and costs/contract.				
			Review technology being used.				

*TFM Audit Program - Schedule*

Customer: \_\_\_\_\_  
 Dates of Visit: \_\_\_\_\_

AREA	TFM	CUSTOMER	SUBJECT	PRE-VISIT	Day 1	Day 2	Day 3
Janitorial / House Services			Review organization and costs/contract.				
			Assess quality.				
			Understand customer service, performance criteria.				
			Review pest control and window washing processes.				
Grounds			Review organization and costs/contract.				
			Assess scope of services.				
			Review snow removal process.				
Energy			Obtain rate analysis, utility bill information.				
			Review lighting configuration.				
			Review Energy Management System.				
			Identify conservation initiatives.				
Tax & Insurance			Understand how manages property taxes.				
			Review insurance costs.				
Project Management			Determine in-house resources.				
			Review project mgmt process: bidding, cost commitment tracking, change order processing, closing, etc.				
Regulatory Compliance			Review other areas of risk: ADA, site safety, asbestos, CFC, etc.				
Facility Planning			Review facility planning process.				
			Determine resources involved in implementing moves.				

**I. Please provide copies of the following information.**

*Please submit this form with the information. Is the information complete?*

<b>Yes</b>	<b>No</b>	<b>Partial</b>
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**A. Organization**

1. Facility Management Organizational Chart
2. Job Descriptions


**B. Vendor Contracts (full contract or abstract)**

1. Janitorial
2. Window Washing
3. Trash Removal
4. Equipment Leases
5. Landscaping Interior & Exterior
6. Snow Removal
7. Elevator Maintenance
8. Other major contracts
9. Records of 1 sample competitive bid analysis


**C. Financials**

1. 1994 Facility Management Operating Budget
2. 1994 Actual Operating Expenses
3. 1995 Facility Management Operating Budget
4. 1994 Capital Expenditure Budget
5. 1994 Actual Capital Expenditures
6. 1995 Capital Expenditure Budget


Please submit this form with the information. Is the information complete?

<b>Yes</b>	<b>No</b>	<b>Partial</b>
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**D. Other**

- 1. Site Plan (8.5" x 11")
- 2. Utility Bills for past 18-24 months, by utility
- 3. Invoice Payment Procedures


**II. Please provide the following information. If you have multiple facilities with very different uses, please fill out a separate form for each group of buildings.**

**A. General Building Information**

- 1. Project Name \_\_\_\_\_
  
- 2. Age \_\_\_\_\_
  
- 3. Location
  - 3.1 Address \_\_\_\_\_  
\_\_\_\_\_
  
  - 3.2 Downtown, Suburban, or Other \_\_\_\_\_
  
- 4. Owned or Leased? \_\_\_\_\_
  
- 5. General Site Description \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
- 6. Tenants \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**B. Non-Financial Metrics**

1. Building Size

1.1 # of Buildings	_____	
1.2 # of Stories Above Ground	_____	
	<u>Square Feet</u>	<u>%</u>
1.3 Gross SF*	_____	_____
1.4 Rentable SF**	_____	_____
1.5 Office	_____	_____
1.6 Warehouse	_____	_____
1.7 Data Center	_____	_____
1.8 Research & Development	_____	_____
1.9 Manufacturing	_____	_____
1.10 Total Acres	_____	
1.11 Acres Landscaped	_____	
1.12 Acres Wild	_____	

\* The *gross square footage* is the sum of the areas of each floor level, including cellars, basements, mezzanines, penthouses, corridors, lobbies, stores, offices, garages within the building, included within the principal outside faces of the exterior walls, not including architectural setbacks or projections. Include all stories or areas which have floor surfaces with clear standing head room (6' 6" minimum) regardless of use.  
 Where a ground level area, or part thereof within the principle outside faces of the exterior wall is left unenclosed, the gross area of the unenclosed portions is to be considered in the total.  
 All unroofed areas and unenclosed roofed-over spaces, except as defined above, are to be excluded from the total.

\*\* The *rentable square footage* is to be measured from the inside finished surface of the outer building wall, excluding any major vertical penetration of the floor (e.g. elevator shafts, stairwells, pipe shafts, and vertical ducts). No deductions should be made for columns or projections necessary to the building. Include space such as mechanical room, janitorial room, restrooms and lobby of the floor.



2. Parking Information

- 2.1 Total # of spaces \_\_\_\_\_
- 2.2 # of spaces covered \_\_\_\_\_
- 2.3 # of spaces surface \_\_\_\_\_
- 2.4 Parking Ratio \_\_\_\_\_ per \_\_\_\_\_ sf

3. Cleaning

- 3.1 Cleanable SF\*
- 3.2 Fully loaded hourly custodial rate \_\_\_\_\_
- 3.3 SF cleaned per cleaner (8-hour shift) \_\_\_\_\_
- 3.4 # of cases of paper supplies per year \_\_\_\_\_
- 3.5 Cost per case of paper supplies \_\_\_\_\_
- 3.6 Contract cost exterior window washing \_\_\_\_\_
- 3.7 Frequency of window washing \_\_\_\_\_ per \_\_\_\_\_

\* *Cleanable SF* is the area being cleaned on a regular basis as reflected per the contract specifications. Do not include stairwell square footage even though stairwells are typically cleaned per a standard specification. Cleanable square footage plus non-cleanable square footage should equal rentable square footage.

4. Repairs & Maintenance

- 4.1 Avg. response time \_\_\_\_\_
- 4.2 Avg. work orders per shift \_\_\_\_\_
- 4.3 # of shifts for Maintenance staff \_\_\_\_\_
- 4.4 Maintenance staff per first shift \_\_\_\_\_
- 4.5 Maintenance staff per second shift \_\_\_\_\_
- 4.6 Maintenance staff per third shift \_\_\_\_\_
- 4.7 Maintenance cost per elevator \_\_\_\_\_
- 4.8 Number of elevators \_\_\_\_\_

5. Utilities

- 5.1 Kilowatt hours \_\_\_\_\_
- 5.2 Kilowatt hours per ton (chilled water) \_\_\_\_\_
- 5.3 Chiller tons per sf \_\_\_\_\_
- 5.4 Power Plant staff per shift \_\_\_\_\_
- 5.5 # shifts for Power Plant \_\_\_\_\_
- 5.6 Steam cost per M/LB \_\_\_\_\_
- 5.7 Avg. cost per kilowatt hour \_\_\_\_\_
- 5.8 Percentage buiding VAV \_\_\_\_\_

6. Administrative

- 6.1 # Property Management Staff \_\_\_\_\_
- 6.2 Employee moves per month \_\_\_\_\_

7. Projects

- 7.1 Five-year annual running rate avg. \_\_\_\_\_

8. Security

- 8.1 Fully loaded hourly security officer rate \_\_\_\_\_
- 8.2 Total personnel per day shift \_\_\_\_\_
- 8.3 Total personnel per night shift \_\_\_\_\_
- 8.4 Total personnel per weekend shift \_\_\_\_\_
- 8.5 # of Entraces w/ Guards \_\_\_\_\_
- 8.6 # of Main Building Entrances \_\_\_\_\_

9.	Other							
	9.1	Average occupancy rate 1997						
	9.2	Occupancy rate as of 12/31/98						
	9.3	Current asset valuation						
	9.4	Outside market comparable rental rate						
	9.5	# of Cafeterias Operated						

Instructions: Please provide annual operating costs for the accounts below. It is important to allocate costs per the chart of accounts listed below. Complete descriptions for each account line follow this worksheet. Please note if your cost allocations vary in any way from the account descriptions that follow.

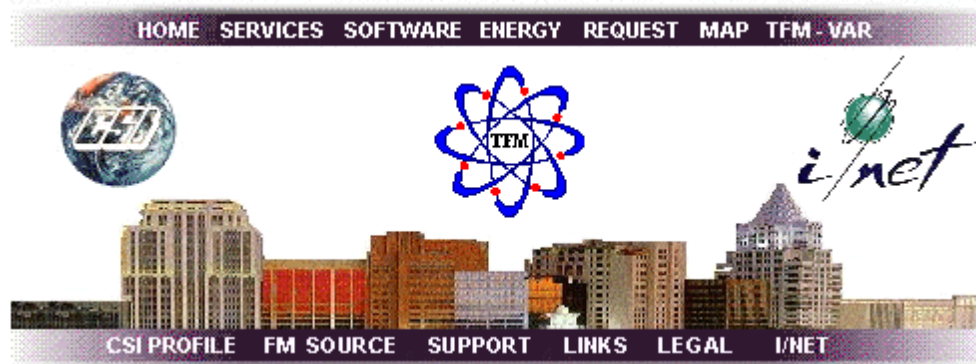
Costs are for \_\_\_\_\_ year, budget \_\_\_\_ or actual \_\_\_\_\_.

Account	Annual Cost	Notes
<b>Cleaning</b>		
Labor		
Contracted Services		
Supplies & Materials		
Trash Removal		
Misc. (e.g. windows, laundry)		
<b>Total Cleaning</b>		
<b>Repairs &amp; Maintenance</b>		
Labor		
Elevator Contract		
HVAC		
Electrical		
Structural / Roof		
Plumbing		
Fire and Life Safety		
Other Building Maintenance & Supplies		
<b>Total Repairs &amp; Maintenance</b>		
<b>Utilities</b>		
Electricity		
Water/Sewer		
Gas/Steam		
<b>Total Utilities</b>		
<b>Account</b>	<b>Annual Cost</b>	<b>Notes</b>

<b>Roads &amp; Grounds</b>	
Labor	
Contract Services	
Supplies & Maintenance	
<b>Total Roads &amp; Grounds</b>	
<b>Security</b>	
Labor	
Contract Services	
Security Systems	
<b>Total Security</b>	
<b>Administrative</b>	
Administrative Personnel	
Management Fee	
Professional Fees	
General Office Expense	
Other Administrative Expenses	
<b>Total Administrative</b>	
<b>Projects</b>	
<b>Total Project Expense</b>	
<b>Total Operating Expenses</b>	
<b>Fixed Expenses</b>	
Taxes	
Insurance	
Depreciation	
<b>Total Fixed Expenses</b>	
<b>Total Operating &amp; Fixed Expenses</b>	

# *Technical Facility Management* *FACILITY CONSULTING SERVICES*

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