FACILITY CONDITION ASSESSMENT (FCA) SCOPE DEFINITION WORKSHEET

Organization:		**Date:**	
Completed by:		Title:	
Department:		Phone:	

PURPOSE OF THIS WORKSHEET

Complete this worksheet before drafting your RFP to clarify the level of detail, scope boundaries, and deliverables you need from an FCA consultant. Your responses will help you communicate clear expectations and receive comparable proposals.

This worksheet was created by James Hand, Facilities Director at Fargo Public Schools, to share lessons learned from conducting Facility Condition Assessments. It is offered as a resource for districts seeking clear, actionable guidance as they begin FCA planning. Suggestions for future enhancements are welcome at: hand.james@icloud.com

COST GUIDANCE:

Throughout this worksheet, you'll find estimated cost ranges (per SF or flat fees) in green text. These are typical industry ranges and will vary based on:

- Geographic location and local labor rates
- Building complexity, age, and condition
- Portfolio size (larger projects typically have lower per-SF costs)
- Accessibility and site constraints
- Consultant experience and qualifications

Note: The cost ranges shown for inventory levels and inspection levels work together in the overall assessment - they are *not* simply added together. For example, a Standard assessment (System-level inventory + Level B inspection) totals approximately $0.10-$0.20/SF for the complete service, not $0.08-$0.15 *plus* $0.04-$0.08. The "Budget Reality Check" section later in this worksheet shows realistic all-in costs for complete FCA packages.

QUICK REFERENCE: FCA PLANNING BY PORTFOLIO SIZE

Portfolio Size	Example	Typical Timeline	Standard Cost ($0.10-$0.20/SF)	Comprehensive Cost ($0.25-$0.40/SF)
Small (100K-500K SF)	2-8 schools	2-3 months	$10K-$100K	$25K-$200K
Medium (500K-1.5M SF)	8-25 schools	3-6 months	$50K-$300K	$125K-$600K
Large (1.5M-5M SF)	25-80 schools	6-9 months	$150K-$1M	$375K-$2M
Very Large (5M+ SF)	80+ schools	9-12 months	$500K-$3M+	$1.25M-$5M+

SECTION 1: ASSESSMENT OBJECTIVES

What are your primary goals for this FCA? (Check all that apply)

☐ Capital planning and budgeting (5-10+ year horizon)

☐ Immediate health/safety issue identification

☐ Deferred maintenance backlog quantification

☐ Facility master planning support

☐ Bond referendum or funding justification

☐ Compliance verification (ADA, code, regulatory)

☐ Energy efficiency/sustainability assessment

☐ Asset management system population

☐ Insurance or risk management requirements

☐ Other: _____

SECTION 2: PORTFOLIO INVENTORY

2A. FACILITIES TO BE ASSESSED

Total number of buildings:	Total estimated square footage:

Building inventory accuracy:

☐ Highly accurate (verified within last 2 years)

☐ Moderately accurate (records exist but not recently verified)

☐ Uncertain (records outdated or incomplete)

☐ Unknown square footage - needs to be measured during assessment

Note: If you are starting from scratch, your business office may have an inventory of buildings and some data available for insurance purposes. This data may need to be updated, but can be a good place to start.

List building types and quantities:

Building Name	Building Type	Square Feet	Year Built	Major Additions	Address

2B. SITE IMPROVEMENTS & OUTDOOR ASSETS

Which of the following should be included in the assessment?

Athletic Facilities:

☐ Football/soccer fields ☐ Baseball/softball fields

☐ Track & field facilities ☐ Tennis courts

☐ Basketball courts (outdoor) ☐ Playground equipment

☐ Bleachers/press boxes ☐ Field lighting

☐ Concession stands/restrooms ☐ Other: _____

Site Infrastructure:

☐ Parking lots ☐ Sidewalks and pathways

☐ Site drainage systems ☐ Retaining walls

☐ Fencing and gates ☐ Site lighting

☐ Signage and wayfinding ☐ Landscaping/irrigation

☐ Other: _____

Auxiliary Structures:

☐ Storage sheds ☐ Maintenance buildings

☐ Portable/modular classrooms ☐ Greenhouses

☐ Bus shelters ☐ Other: _____

2C. INFRASTRUCTURE & SYSTEMS

Which underground/concealed systems should be assessed?

☐ Underground storage tanks ☐ Storm drainage systems

☐ Septic systems ☐ Underground storage tanks

☐ Underground utilities (water, sewer, gas, electric)

☐ Other: _____

Note: Some systems may require specialized assessment. Indicate if you have concerns:

_____

SECTION 3: ASSET INVENTORY GRANULARITY

ABOUT UNIFORMAT II CLASSIFICATION:

Most FCA consultants use the UNIFORMAT II classification system, which organizes building elements into 5 hierarchical levels (from broad categories to specific components). The three simplified levels below map to UNIFORMAT as follows:

Your Selection	Maps to UNIFORMAT	Example
BUILDING LEVEL	Level 1-2: Major Groups	B Substructure C Shell D Services
SYSTEM/AREA LEVEL	Level 3-4: Systems & Sub-Elements	B30 Roofing B3010 Roof Coverings B301001 High Slope
INDIVIDUAL ASSET LEVEL	Level 5: Component Types	B30100101 Shingle B30100102 Metal B30100103 Clay Tile
Why this matters: Using UNIFORMAT ensures your FCA data is compatible with capital planning software (e.g., VFA, Gordian), allows for benchmarking against other facilities, and provides a common language between owner and consultant.		
Note: You can request that consultants use UNIFORMAT coding in their deliverables without specifying which level - they'll understand what you mean by "System-level" or "Component-level" detail.		

How detailed should the asset inventory be?

BUILDING LEVEL (lowest detail/cost)
Estimated Cost: $0.03 - $0.08 per SF
UNIFORMAT Level 1-2 equivalency

☐ Systems tracked at building level only

- Example: "Building A - B30 Roofing" (one asset for entire roof system)
- Example: "Building A - D30 HVAC" (one asset for entire HVAC system)
- Example: "Building A - C10 Interior Construction" (one asset)

SYSTEM/AREA LEVEL (moderate detail/cost)
Estimated Cost: $0.08 - $0.15 per SF
UNIFORMAT Level 3-4 equivalency

☐ Systems broken into major components or areas

- Example: "B3010 Roof Coverings - Section 1 (Built-up, 1995)" and "B3010 - Section 2 (TPO, 2008)"
- Example: "D3020.01 Heat Generating Systems - Boiler #1", "D3020.01 - Boiler #2"
- Example: "C3020 Exterior Doors - North Entrance", "C3020 - South Entrance"

INDIVIDUAL ASSET LEVEL (highest detail/cost)

Estimated Cost: $0.15 - $0.30 per SF

UNIFORMAT Level 5 equivalency

☐ Every distinct piece of equipment cataloged with serial numbers

- Example: "B30100101 Shingle Roof - Section A", "B30100102 Metal Roof - Section B"
- Example: Every air handler tagged: "D3040.01.001 AHU-1", "D3040.01.002 AHU-2", each with model, serial number
- Example: Individual lighting fixtures, plumbing fixtures, each with unique identifier and specifications

Your selection: ☐ Building Level ☐ System/Area Level ☐ Individual Asset Level

Or specify different levels for different systems:

TIP: You can reference UNIFORMAT codes in your RFP to be more specific. For example: "Level 4 detail for B30 Roofing and D30 HVAC, Level 2 for all other systems."

System/Category	Desired Detail Level
Roofing (B30)	
HVAC (D30)	
Electrical (D50)	
Plumbing (D20)	
Building envelope (B20, C10-C30)	
Interior finishes (C30)	
Life safety systems (D40)	
Other:	

SECTION 4: CONDITION ASSESSMENT DEPTH

How thorough should the condition inspection be?

LEVEL A: VISUAL WALKTHROUGH (lowest cost)

Estimated Cost: $0.02 - $0.05 per SF

☐ Select this level

- Observable conditions only from walking through spaces
- No ladders, no opening panels, no equipment accessed
- General condition ratings (Good/Fair/Poor)
- Estimated remaining useful life based on age and visual observation

LEVEL B: ACCESSIBLE ASSESSMENT (moderate cost)

Estimated Cost: $0.04 - $0.08 per SF

☐ Select this level

- Access readily available areas (open ceiling grids, mechanical rooms, roofs)
- Use ladders and basic tools to inspect equipment
- Open electrical panels and observe
- Document nameplate data, serial numbers when accessible
- More detailed condition observations
- Photos of key assets and deficiencies

LEVEL C: INTRUSIVE/DETAILED INSPECTION (highest cost)

Estimated Cost: $0.08 - $0.12 per SF

☐ Select this level

- Remove equipment covers, access panels
- Above-ceiling inspection in multiple areas
- Infrared scanning, testing, measurements
- Core samples or destructive testing (if needed)
- Detailed documentation of each asset
- Comprehensive photo documentation

Or specify different levels for different systems:

System/Category	Inspection Level (A, B, or C)
Roofing	
HVAC	
Electrical	
Plumbing	
Structural	
Life safety systems	

SECTION 5: SPECIALIZED ASSESSMENTS

IMPORTANT: What's Included in Base FCA vs. Add-On Services

INCLUDED IN BASE FCA COST	SPECIALIZED ADD-ON SERVICES (Section 5)
Visual condition assessment of all systems **Asset inventory and documentation** **Remaining useful life estimates** **Replacement cost estimates** **Noting obvious deficiencies and code/safety issues during walkthrough**	Comprehensive compliance audits by certified specialists Detailed testing with specialized equipment Lab testing and material sampling In-depth engineering analysis Formal certification reports
Example: Inspector notes "Roof showing signs of wear, estimated 5 years remaining life" or "Exit door lacks panic hardware - likely code violation"	**Example:** CASp-certified specialist conducts room-by-room ADA audit with measurements and photos, generates 50-page compliance report with prioritized remediation plan and costs

When to Include Specialized Assessments:

- You need formal certification or specialist sign-off (e.g., ADA compliance certificate, environmental clearance)
- You're preparing for a bond referendum and need detailed supporting documentation
- You have known or suspected issues that require expert analysis (e.g., asbestos concerns)
- Regulatory requirements mandate specific assessments
- You want performance data beyond visual observation (e.g., actual HVAC efficiency testing)

Note: Most school districts conducting standard FCAs for capital planning do NOT include specialized assessments in their base scope. Add these selectively based on specific needs, as they can significantly increase project cost and timeline.

Should the FCA include any of the following specialized assessments?

Code Compliance (Optional Specialist Reviews):

☐ ADA accessibility assessment (+$0.02-$0.05/SF or ~$2,000-$5,000 per building)

☐ Fire/life safety code compliance (+$0.01-$0.04/SF)

☐ Building code compliance (+$0.02-$0.06/SF)

☐ Energy code compliance (+$0.02-$0.05/SF)

☐ Other: _____

Environmental/Health:

☐ Asbestos survey (+$0.05-$0.10/SF)

☐ Lead paint survey (+$0.05-$0.10/SF)

☐ Mold assessment (+$0.03-$0.08/SF)

☐ Indoor air quality (+$0.03-$0.08/SF)

☐ Radon testing (+$100-$300 per test location)

☐ Other: _____

Performance Testing:

☐ HVAC system performance testing (+$0.01-$0.03/SF)

☐ Electrical load analysis (+$0.02-$0.05/SF)

☐ Plumbing flow testing (+$0.01-$0.03/SF)

☐ Window/envelope air leakage (+$0.03-$0.08/SF)

☐ Lighting levels (+$0.01-$0.02/SF)

☐ Other: _____

Structural:

☐ Structural engineer evaluation (+$0.05-$0.15/SF)

☐ Seismic assessment (+$0.08-$0.20/SF)

☐ Foundation assessment (+$0.04-$0.10/SF)

☐ Other: _____

SECTION 6: DATA ACCURACY & DOCUMENTATION

What level of data accuracy and documentation do you require?

BUILDING DATA COLLECTION:

☐ Verify/measure square footage during assessment (+$0.01-$0.03/SF)

☐ Use existing records for square footage (no additional cost)

☐ Update floor plans if significantly different from as-builts (+$0.05-$0.15/SF)

☐ Create floor plans if none exist (+$0.10-$0.30/SF)

ASSET DATA REQUIREMENTS:

For each asset/system (where applicable), capture:

☐ Description/location	☐ Manufacturer/model
☐ Installation date	☐ Serial number
☐ Capacity	☐ Size (SF, Acres)
☐ Condition rating	☐ Estimated remaining useful life
☐ Replacement cost	☐ Photo documentation
☐ Repair cost (if applicable)	☐ Detailed notes/observations
☐ Priority rating	☐ Other: _____

NOTE: Ensure all data is collected in unique data fields. For example, if data is delivered in a spreadsheet, each data point should be in a unique cell.

PHOTO DOCUMENTATION REQUIREMENTS:

☐ Representative photos of each system type

☐ Photos of all deficiencies

☐ Photo of every major asset

☐ Comprehensive photo documentation throughout buildings

SECTION 7: COST MODELING & ANALYSIS

REPLACEMENT COSTS:

☐ Use RS Means or similar cost database (less accurate, lower cost)

☐ Use local contractor pricing (more accurate, higher cost)

☐ Include design/engineering costs in replacement costs

☐ Include escalation factors for future years

COST PLANNING HORIZON:

☐ 5 years ☐ 10 years ☐ 15 years ☐ 20 years

PRIORITIZATION CRITERIA:

How should repair/replacement needs be prioritized? (Rank 1-5, with 1 being most important)

___ Health & safety risk

___ Functional/operational impact

___ Likelihood of failure

___ Code compliance requirements

___ Cost efficiency (cost per year of extended life)

LIFECYCLE ANALYSIS:

☐ Include lifecycle cost analysis (repair vs. replace decisions)

☐ Energy cost impact analysis for HVAC/envelope improvements

☐ Total cost of ownership modeling

SECTION 8: DELIVERABLE FORMAT & INTEGRATION

REPORT FORMAT PREFERENCES:

☐ PDF summary report with key findings

☐ Detailed system-by-system narrative report

☐ Excel database of all assets and costs

☐ Interactive dashboard/web portal

☐ Executive summary presentation

☐ Other: _____

DATA SYSTEM INTEGRATION:

Do you need the FCA data formatted for specific software?

Current or planned systems:

☐ Computerized Maintenance Management System (CMMS): _____

☐ Capital Planning/Budgeting Software: _____

☐ Building Information Modeling (BIM) or CAD: _____

☐ Asset Management System: _____

☐ GIS (Geographic Information System): _____

☐ Other: _____

Preferred data format: ☐ Excel ☐ CSV ☐ SQL database ☐ Other: _____

SECTION 9: ADDITIONAL "WHILE WE'RE HERE" SERVICES

Should the consultant provide additional services during site visits?

DOCUMENTATION SERVICES:

☐ 360° photo capture/virtual tours (+$0.05-$0.10/SF) - specify areas: _____

☐ Drone/aerial photography (+$500-$1,000 per building/site)

☐ Updated floor plans or building measurements (+$0.05-$0.15/SF)

☐ Equipment/room numbering system creation (+$0.02-$0.05/SF)

ASSET MANAGEMENT SUPPORT:

☐ Asset tagging (QR codes, barcodes, RFID) (+$5-$10 per asset)

☐ Create asset tracking system (+$5,000-$25,000 setup fee)

☐ Integrate with existing asset management platform (+$3,000-$15,000)

PLANNING SUPPORT:

☐ Space utilization assessment (+$0.03-$0.08/SF)

☐ Energy audit/benchmarking (+$0.02-$0.06/SF)

☐ Sustainability/LEED assessment (+$0.03-$0.08/SF)

☐ Hazardous materials inventory (+$0.05-$0.10/SF)

☐ Other: _____

SECTION 10: ACCESS & LOGISTICS

BUILDING ACCESS:

☐ Consultant will have full building access during business hours

☐ Escorted access required

☐ After-hours access available: ☐ Yes ☐ No

☐ Keys/access cards will be provided

☐ Some areas restricted (specify): _____

OCCUPIED VS. UNOCCUPIED:

☐ Buildings fully occupied during assessment

☐ Assessment during summer/breaks when unoccupied

☐ Mixed - some occupied, some not

TIMELINE CONSTRAINTS:

Desired assessment completion timeframe: _____

Report delivery deadline: _____

Critical dates to avoid: _____

HISTORICAL INFORMATION AVAILABLE:

What existing documentation will you provide to the consultant?

☐ Previous FCA reports (year: _____)

☐ As-built drawings

☐ Maintenance records

☐ Equipment warranties

☐ Recent capital improvements list

☐ Asset inventory lists

☐ O&M manuals

☐ Prior deficiency reports

☐ Energy audits

☐ Environmental reports

☐ Other: _____

SECTION 11: BUDGET & VALUE CONSIDERATIONS

PRELIMINARY BUDGET RANGE (if known):

$_____ to $_____

BUDGET PRIORITY:

If budget is limited, which is most important?

☐ Assess all buildings at lower detail level

☐ Assess priority buildings at higher detail level

☐ Focus on specific systems across all buildings (specify): _____

☐ Phased approach - critical buildings first, others later

VALUE-ADDED PRIORITIES:

What would make this FCA most valuable to your organization? (Rank 1-3)

___ Accuracy of cost estimates

___ Comprehensive asset inventory

___ Actionable short-term recommendations

___ Long-term capital planning data

___ Easy-to-use database/tools

___ Buy-in from stakeholders (board, community)

SECTION 12: STAKEHOLDER INVOLVEMENT

Who needs to be involved or informed during the FCA process?

DECISION MAKERS:

☐ Superintendent ☐ School Board

☐ Facilities/Operations Director ☐ CFO/Business Manager

☐ Other: _____

TECHNICAL STAFF:

☐ Maintenance staff interviews needed

☐ Building principals/site staff involvement

☐ IT staff (for data systems integration)

COMMUNITY/STAKEHOLDER INPUT:

☐ Public presentation of findings required

☐ Board presentation required

☐ Staff input sessions needed

SECTION 13: POST-ASSESSMENT NEEDS

What happens after the FCA is complete?

SHORT-TERM (within 1 year):

☐ Present findings to board/leadership

☐ Develop immediate action plan for critical items

☐ Update capital improvement plan

☐ Prepare bond referendum materials

☐ Other: _____

LONG-TERM (1-5+ years):

☐ Annual FCA updates needed

☐ Multi-year capital planning

☐ Asset management system maintenance

☐ Ongoing consultant support

SECTION 14: RFP SPECIFICATION DEVELOPMENT

Based on your responses above, summarize your core scope requirements:

ASSET INVENTORY:

Detail level: _____

UNIFORMAT level (if specified): _____

Systems included: _____

_____

INSPECTION DEPTH:

Assessment level: _____

Special considerations: _____

_____

DELIVERABLES:

Required formats: _____

Integration needs: _____

_____

OPTIONAL ADD-ONS TO PRICE SEPARATELY:

1. _____

2. _____

3. _____

4. _____

ESTIMATED PROJECT COST CALCULATOR

Use this section to estimate your total FCA project cost based on the options selected above.

BASE ASSESSMENT COST

Component	Selection	Cost Range ($/SF)	Estimated Cost
Total Building SF:	_____	---	---
Asset Inventory Level	☐ Bldg ☐ Sys/Area ☐ Individual	$_____ - $_____	$_____
Inspection Depth	☐ Level A ☐ Level B ☐ Level C	$_____ - $_____	$_____
Subtotal (Base Assessment):			**$_____**
Cost Range per SF:			$_____ - $_____

OPTIONAL ADD-ONS (per SF or flat fee)

Service	Cost Range	Estimated Cost
Building measurement/verification	$_____ /SF	$_____
Floor plan updates	$_____ /SF	$_____
Code compliance assessment	$_____ /SF	$_____
Environmental assessment	$_____ /SF	$_____
Performance testing	$_____ /SF	$_____
Structural assessment	$_____ /SF	$_____
360° photo/virtual tours	$_____ /SF	$_____
Drone photography	$_____ flat fee	$_____
Asset tagging	$_____ /SF or per asset	$_____
Energy audit	$_____ /SF	$_____
Space utilization study	$_____ /SF	$_____
Other: _____	$_____	$_____
Other: _____	$_____	$_____
Subtotal (Add-ons):	**$_____**	**$_____**

TOTAL ESTIMATED PROJECT COST

Base Assessment Cost:	**$_____**
Add-ons Cost:	$_____
TOTAL PROJECT COST:	**$_____**
Contingency (10-15%):	$_____
TOTAL WITH CONTINGENCY:	**$_____**

COST PER SQUARE FOOT SUMMARY:

Total SF:	Total Cost:	Cost per SF:
_____	$_____	$_____

BUDGET REALITY CHECK:

Typical FCA Cost Ranges by Scope (2023-2025 Benchmarks):

- **Basic assessment (Building-level inventory + Level A inspection):** $0.05 - $0.10 per SF
- **Standard assessment (System-level inventory + Level B inspection):** $0.10 - $0.20 per SF
- **Comprehensive assessment (Individual asset inventory + Level B/C inspection + select specialized add-ons):** $0.25 - $0.40 per SF
- **Premium assessment (All-inclusive with multiple specialized add-ons):** $0.40 - $0.50 per SF

Example: A 500,000 SF school district portfolio with a standard assessment (System-level inventory + Level B inspection) would typically cost $50,000 - $100,000 ($0.10-$0.20/SF).

Important Note: These ranges represent complete FCA costs including both inventory and inspection. Costs for inventory levels and inspection levels are *not* simply additive - they work together. The ranges above reflect real-world 2023-2025 pricing from school district RFPs and industry benchmarks.

What's Included: Base FCA costs include visual condition assessment, asset inventory, remaining life estimates, replacement costs, and noting obvious deficiencies. *Specialized assessments (Section 5) are additional* - add those costs separately if needed for comprehensive code audits, hazmat testing, or performance testing beyond visual observation.

NEXT STEPS

☐ Review worksheet with leadership team

☐ Obtain preliminary budget approval

☐ Draft RFP using scope parameters defined above

☐ Schedule pre-proposal site tours

☐ Prepare documentation to provide to consultants

NOTES & QUESTIONS FOR POTENTIAL CONSULTANTS:

_____

_____

_____

_____

_____

TIPS FOR USING THIS WORKSHEET

INVOLVE THE RIGHT PEOPLE: Complete this with input from facilities staff, finance/budget team, and leadership who will use the FCA data.

BE REALISTIC ABOUT BUDGET: Higher detail = higher cost. Consider what level of detail you actually need vs. "nice to have."

THINK ABOUT DATA USE: The best scope matches how you'll actually use the data. If you won't maintain an asset management system, don't pay for individual asset-level detail.

USE UNIFORMAT TERMINOLOGY: Including UNIFORMAT references in your RFP (e.g., "Level 3 detail for all systems") ensures consultants understand exactly what you want and helps with future data compatibility.

ALLOW CONSULTANT INPUT: Share a draft of your scope parameters and ask consultants to recommend adjustments during the RFP process.

CONSIDER PHASING: If budget is tight, phase the work - start with critical buildings/systems and expand later.

PLAN FOR UPDATES: FCAs become outdated. Consider how you'll maintain or update the data over time.

QUESTIONS OR FEEDBACK?

If you have questions about using this worksheet or suggestions for improvements, please don't hesitate to reach out:

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This worksheet is a planning aid and does not constitute professional advice or a mandated standard. Districts should tailor scope elements to local requirements, budget, and regulatory context.