National Center on School Infrastructure

Improving Facility Condition Assessment (FCA) Outcomes: A Guide to the FCA Scope Definition Worksheet

A practical look at the Facilities Conditions Assessment (FCA) Scope Definition Worksheet and why it belongs in every facility director's toolkit before the next request for proposals (RFP) goes out the door.

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Based on the FCA Scope Definition Worksheet (Version 2.0, December 2025) created by James Hand, (former) Facilities Director, Fargo Public Schools

Introduction

If you've ever received three wildly different proposals in response to an FCA Request for Proposals, you already know the problem. One consultant quotes $50,000 for a "comprehensive assessment." Another comes in at $350,000 for what sounds like the same work. A third offers something in between but uses terminology you've never seen. You're left comparing apples to aircraft carriers, and your board wants answers by Thursday.

The root issue isn't the consultants. It's the RFP itself. (Okay, sometimes it's the consultants, but most likely the problem is the RFP itself!)

The Facility Condition Assessment (FCA) Scope Definition Worksheet, created by James Hand, former Facilities Director at Fargo Public Schools and published through the National Center on School Infrastructure (NCSI), tackles this problem head-on. It's a 22-page fillable document designed to be completed before you ever draft an RFP, and the difference it makes in proposal quality, cost clarity, and project outcomes is substantial.

Using the worksheet, you focus on what you want out of your FCA. You aren't cobbling together an RFP from RFPs you happen to find from other districts, or out-of-date ones you've used in the past. Instead, the FCA Scope Definition Worksheet guides you in outlining your goals and specific objectives, then creating an RFP for the work you actually need.

What the Worksheet Does for You

At its core, the worksheet forces a district to answer the questions it didn't know it needed to ask. It walks through 14 sections that progressively build a complete picture of what the FCA should accomplish, how detailed it should be, and what the deliverables need to look like. Here's what makes each section valuable.

Assessment Objectives (Section 1)

This section starts with the "why." Is this FCA for capital planning over a 10-year horizon? Bond referendum justification? Deferred maintenance quantification? Compliance verification? This answer shapes everything that follows because it informs the level of detail you need, and thus need to pay for (or not). A district preparing for a bond vote needs different data than one simply updating its capital improvement plan. The worksheet makes that distinction explicit from the outset.

Portfolio Inventory (Section 2)

This section gets specific about what's actually being assessed. Not just buildings, but athletic facilities, site infrastructure, auxiliary structures, and underground systems. The worksheet prompts districts to consider whether parking lots, playground equipment, retaining walls, portable classrooms, and storm drainage systems belong in the scope. These are the items that routinely get missed in loosely defined RFPs, then surface as change orders later.

Asset Inventory Granularity (Section 3)

This is where the worksheet earns its keep. It introduces the Uniformat classification system and maps three practical detail levels: Building Level (Uniformat Levels 1–2), System/Area Level (Uniformat Levels 3–4), and Individual Asset Level (Uniformat Level 5). Each comes with clear examples and estimated costs per square foot. A district can even specify different levels of detail for different systems, requesting Level 4 detail for roofing and HVAC while accepting Level 2 for interior finishes. This kind of precision eliminates the most common source of variation in proposals.

Condition Assessment Depth (Section 4)

This section distinguishes three levels of depth for your assessment:

- Level A: a visual walkthrough
- Level B: an accessible assessment in which inspectors open ceiling grids and access mechanical rooms

- Level C: an intrusive inspection involving infrared scanning and testing.

Costs are provided for each level, and the worksheet allows system-by-system customization.

Specialized Assessments (Section 5)

Section 5 draws a critical line between what's included in a base FCA and what constitutes an add-on service. The worksheet guides users through clearly defining what, if any, specialized assessments—such as ADA compliance, hazardous materials, IAQ, etc.— that the district may. The approach to these assessments can range from simple high-level surveys, to highly technical testing and sampling from specialized staff. As with the FCA in general, districts shouldn't let vague RFP language create space for competing vendors to price such services using different assumptions. Section 5 guides you to articulate specialized assessments in a way that crystallizes your desired outcomes, so that vendors are responding to specific rather than generic needs.

This distinction can save a district tens of thousands of dollars on unnecessary scope, or, alternatively, ensure that a district with known asbestos concerns or ADA compliance needs has those items properly priced.

The Devil is in the Details (Sections 6 through 13)

Sections 6 through 13 of the worksheet provide a framework for defining the technical standards, logistical requirements, and strategic outcomes of a Facility Condition Assessment to ensure the resulting data is both accurate and compatible with organizational goals.

Section 6 establishes data accuracy expectations, such as whether to verify square footage or capture specific asset details like serial numbers and photo documentation.

Sections 7 and 8 address financial modeling and deliverables, allowing users to select cost-estimating methods, set planning horizons, and define how data should integrate with existing software systems.

Sections 9 and 10 identify supplemental services, such as drone photography or asset tagging, and the logistical constraints of the site visits, including building access and available historical records.

Sections 11 through 13 focus on alignment and execution, helping districts prioritize scope if budgets are limited, identify necessary stakeholder involvement, and plan for post-assessment needs like bond referendum support.

Putting It All Together (Section 14)

Finally, Section 14 serves as a summary tool to consolidate these selections into a core scope for a Request for Proposal. This section asks districts to summarize their core scope requirements for asset inventory, inspection depth, deliverables, and optional add-ons that can be priced separately. This summary, filled in after working through the preceding 13 sections, becomes the backbone of a clear, specific, and defensible RFP. You can use Section 14 as your RFP outline to ensure that consultants receive clear, standardized expectations.

The Cost Transparency That Changes Conversations

One of the most powerful features of the worksheet is its embedded cost guidance. Throughout the document, estimated cost ranges appear in context: price per square foot for building-level inventory, which differs from price per square foot for Level B inspection, which differs from price per square foot for ADA accessibility assessment add-ons, and so on. Developed in 2025, the worksheet in its current form contains estimated cost factors; make sure to update these based on your local conditions at the time of use.

The “Budget Reality Check” section provides benchmarked all-in costs drawn from real-life school district RFPs. Note, you’ll need to adjust these based on your local conditions, but these estimates will provide you with basic national averages on how much you should expect to allocate for your FCA.

This is the kind of information that transforms a facility director's conversation with the district's budget officer. Instead of asking for "money for an FCA," you're presenting a defined scope, benchmarked costs, and clear trade-offs. The worksheet even includes an Estimated Project Cost Calculator that walks through base assessment costs, optional add-ons, and contingency, producing a defensible budget number.

Best Practices for Getting the Most Out of the Worksheet

Complete it as a team, not in isolation. The worksheet's own tips section says it plainly: involve facilities staff, the finance and budget team, and leadership who will actually use the FCA data. The choices embedded in this document have budgetary, data management, and strategic implications. No single person should make them alone.

Match the details to the actual data use. The worksheet invites you to specify Individual Asset Level details, including serial numbers, for every piece of equipment. For some districts, particularly large ones, building out a Computerized Maintenance Management System (CMMS) is the right call. For many others, it's expensive overkill. The worksheet wisely advises: if you won't maintain an asset management system, don't pay for individual asset-level detail. You don't want to do it out of aspiration; you want to scope for operational reality.

Use Uniformat terminology in the RFP. Section 3 makes a compelling case for this: it ensures that consultants understand exactly what you want, enables benchmarking against other facilities, ensures compatibility with capital planning software, and provides a common language between the owner and the consultant. When districts across a state all use Uniformat, the resulting data becomes genuinely comparable at the state level.

Think carefully about Deliverable Format and Integration (Section 8). The choices made here determine whether FCA data lives in a PDF that sits on a shelf or flows into a CMMS, capital planning software, or GIS system. The worksheet prompts districts to specify their current and planned systems and preferred data formats.

Don't skip Post-Assessment Needs (Section 13). An FCA that doesn't connect to next steps is an expensive snapshot. The worksheet asks whether findings will be presented to a board, used to develop an immediate action plan, fed into a bond referendum, or maintained through annual updates. These answers should shape the deliverables and the consultant relationship from the start.

How This Improves RFP Outcomes

The downstream effects of a well-scoped FCA RFP are measurable. When every proposing consultant is responding to the same clearly defined scope, proposals become comparable. Cost variations narrow because they reflect genuine differences in approach and qualifications rather than different interpretations of vague requirements. Evaluation committees can focus on value, methodology, and experience rather than trying to decode what each consultant actually intends to deliver.

The resulting FCA itself is better, too. Consultants who receive a detailed scope definition can plan their staffing, timeline, and approach with precision. They know which buildings need attention, what level of detail is expected for each system, which specialized assessments are included, what documentation to bring, and what format the deliverables should take. That clarity translates directly into higher-quality data, fewer surprises during the project, and a final product that actually serves the district's stated objectives.

Getting Started

The FCA Scope Definition Worksheet is available as a free, fillable PDF through the National Center on School Infrastructure (NCSI). Related FCA resources – an FCA Manual and Workbook – are also available through NCSI. The manual provides guidance for conducting FCAs, including action steps for assessing exterior and interior conditions, as well as mechanical, electrical, and plumbing systems. The workbook allows users to compile and analyze building data.

The worksheet doesn't replace professional judgment. It sharpens it. And in a field where the gap between a good FCA and a wasted one often comes down to how well the scope was defined, these details matter.

Why This Matters at the State Level

The FCA Scope Definition Worksheet and the FCA Manual and Workbook were designed for local school districts, but their implications scale well beyond the district level. For state facility directors overseeing capital planning across dozens of districts, the compounding effect of widespread adoption is significant.

State directors are well-positioned to shape two decisions that individual districts often struggle with. The first is over-scoping: districts sometimes request individual asset-level detail — serial numbers, installation dates, full equipment inventories — out of aspiration rather than operational capacity. If a district has no asset management system and no plan to build one, that level of detail is expensive and quickly goes stale. State directors can establish clear guidance on scoping that aligns with operational realities on the ground in LEAs.

The second is deliverable integration: the choices districts make about data formats and software platforms in Section 8 of the worksheet determine whether FCA data flows into capital planning systems or sits in a three-ring binder on a shelf. States that have adopted preferred platforms or statewide data standards should make those expectations explicit before districts issue RFPs, not after.

But from a state level, the core issue that these tools help facilitate is data compatibility. When districts independently and inconsistently define FCA scope and structure, the resulting datasets cannot be combined and compared. At the state level, you end up with a patchwork of incomparable assessments — different classification systems, different inspection depths, different deliverable formats — that cannot be meaningfully synthesized into a statewide picture. When districts use a structured scope definition process built around standard Uniformat terminology (as described in the FCA Manual and Workbook), that problem largely disappears. The data from one district to the next is consistent, comparable, and far more useful for statewide capital planning and funding prioritization.

The logic chain, followed through, is straightforward: consistent scope definitions produce consistent data, consistent data enables defensible statewide infrastructure assessments, and defensible assessments support better-informed funding decisions.

For state facility directors, the highest-leverage move may be the simplest one: share these resources with your local school districts and encourage their use as standard practice. Encouraging districts to use the worksheet before drafting an RFP is a low-cost intervention with meaningful returns at the state level.

The FCA Scope Definition Worksheet was created by James Hand, Facilities Director at Fargo Public Schools, and is available through the National Center on School Infrastructure. NCSI is funded by the U.S. Department of Education to serve as a national clearinghouse of resources for improving public school infrastructure. Questions or feedback on the worksheet can be directed to James Hand at hand.james@icloud.com.