CASE STUDY

Flying Solo: How a Facilities Team of One Is Building the Case for Strategic Capital Investment

The Client

Brewster Academy, a small independent high school on Lake Winnipesaukee in New Hampshire, is dedicated to "optimizing the learning, living, and athletic experience of students while helping them grow strong in mind, body, and spirit." The school's 500,000 square feet of facilities plays a key role in achieving part of that mission. With 20 dormitories, classrooms equipped to deliver a curriculum that is fully integrated with the latest technology, a performing arts facility, a 50,000 square foot athletics center, and a boathouse and events center, Brewster Academy has made significant investments in making its campus both beautiful and functional to attract and retain the best students and faculty.

The Challenge

Brewster Academy's Facilities Director Dan Noyes is a facility team of one. He manages a million-dollar annual operating budget, and a budget of between six hundred thousand and one million for capital expenditures. Like many facilities managers, Dan knows that the capital budget is insufficient to keep up with the needs of the organization. So does his boss, the school's Chief Financial Officer. But without a convincing case based on hard data, the likelihood of persuading the Board of Directors to allocate more capital funds is low.

The Solution

To build that case, Dan began developing a five- to ten-year capital improvement plan. As a team of one, assessing, analyzing, and developing a compelling business case required a set of tools that was both easy to learn, easy to use, and powerful. He found those tools, and the support to create the right business case, from VFA.

Dan started by collecting facility condition and system lifecycle data using VFA.auditor®, a patented survey-driven application that runs on his iPad®. Working with his VFA consulting team, Dan adapted several out-of-the-box system templates for the campus' larger institutional buildings. For the residential buildings in the Academy's portfolio, Dan built his own surveys by creating systems in VFA.auditor's systems template library, adding the embedded RSMeans® cost data for those systems, and saving them for future use as new VFA.auditor templates.

The first building Dan assessed with his new tool took a day. The second, only a couple of hours. Using the iPad made it easy to take pictures of systems and to follow the survey as he walked through the facilities. And the integrated RSMeans cost data saved him significant time in estimating the costs associated with the deficiencies and lifecycle maintenance requirements.

After gathering the data using the built-in step-by-step survey process, Dan returned to his office and verified and then uploaded the data into VFA.facility®, VFA's cloud-based repository for analysis and reporting. VFA.facility offers Dan a wide range of what-if capabilities to forecast the expected spending required to maintain the current Facility Condition Index (FCI) of the Academy's portfolio, the impact of any changes in capital investment on the FCI, the optimal prioritization of capital funds for multiple investment scenarios, opportunities to utilize capital funds to reduce operating expenses, and a number of other analyses that will help him build his business case for incremental funding.

Dan is committed to doing one building each month for a year, until he has done an initial audit of every facility on campus. Once that's done, he will add ADA and code compliance elements to his surveys. VFA.auditor makes it easy to update the condition data of the various buildings as Dan performs his ongoing maintenance activities, ensuring that his analyses will reflect current, accurate data.

The Results

Dan expects to show short-term payback on his efforts by using his newly collected data to update the school's insurance replacement cost. With an actual cost to replace all the parts of the buildings, including the cost for components that would bring systems such as fire alarms into code, he can go to the insurance company and request a decrease in premiums. Nothing like an immediate payback to build credibility with the CFO and the Board!

During this time Dan will continue to develop his capital improvement plan. He will use the FCI metric to educate the school and the Board about what capital dollars are needed and why, and which buildings need more investment. Many systems are at the end of life, and he can use the data not only to demonstrate the risk that poses to the Academy's normal operations but also to show how addressing expected renewals in a planned fashion can avoid far more costly emergency repairs. He can also use VFA's prioritization capabilities to develop recommendations and alternative scenarios about which projects to undertake when.

As a one-man shop, Dan has taken on the challenge of facilities capital planning and learned how to fly solo. He figured out how to use a set of effective tools to get more done in a few short weeks than he otherwise would be able to do in a year. He's created templates for surveying systems, planned a schedule to assess the portfolio by himself, and laid out a business case to bring to his senior management and the Board to ensure that Brewster Academy achieves its mission. Not bad for a team of one!