

# Facility Condition Assessment + Capital Forecasting Overview



FMX provides a turnkey facility condition assessment, planned maintenance checklists and timing, and a capital forecasting report.

## Facility Condition Assessment (FCA)

Reveal the condition, capacity, and lifespan of your HVAC, plumbing, and electrical systems.

- + Gain a watchlist of items in poor condition to prevent the risk of sudden failure.
- + Build a deferred maintenance backlog of assets past their expected lifespan.
- + Measure each asset's individual capacity to optimize its usage.

### Example: Individual Asset

Capacity	0.5
Capacity Unit	HP
Capacity 2	-
Capacity Unit 2	-
Comments	Fume Hood fans, panel le2a circuit 40
Current Condition	Good
Estimated Installed Year	2006
Expected Life Remaining	5
Expected Replacement Cost	\$3,000.00
Expected Replacement Date	Wed, Mar 1, 2023
Installed date	Wed, Mar 1, 2006
Manufacturer	Greenheck
Model Number	Cube 141 5x
Serial Number	06d18372

### Example: Upcoming Replacements

Equipment Data

Equipment Item Tag	Target Replacement Date	Current Equip Age	Remaining Equip Life	Replacement Cost
AC-7	01/01/2024	21.02	3	\$3,000
AC-1	03/01/2035	4	14.17	\$2,500
	01/01/2032	9	11	\$4,000
AC-2	08/03/2044	1.4	23.6	\$6,474
	01/01/2031	10	10	\$3,500
	01/01/2021	24.02	0	\$13,500
AC-2 > HP-2	08/03/2044	1.4	23.6	\$3,000
	01/01/2022	24.02	1	\$6,500
AC-3	01/01/2032	9	11	\$6,500
AC-4	01/01/2032	9	11	\$6,500
AC-5	01/01/2032	9	11	\$6,500
Academic HVAC Controls	01/01/2031	20.01	10	\$55,000
AH-1	01/01/2046	5	25.02	\$12,500
AH-1 > HP-1/1	01/01/2036	5	15	\$4,000
AH-1 > HP-1/2	01/01/2036	5	15	\$4,000
AH-1 Lobby	01/01/2024	20.01	3	\$5,000
AH-1 Lobby > HP-1 Gym	01/01/2024	20.01	3	\$9,000
AH-2	01/01/2031	10	10	\$8,000
AH-2 > HP-2	01/01/2031	10	10	\$9,000
AH-2 Class 101	01/01/2032	9	11	\$5,000
AH-2 Class 101 > HP-2	01/01/2032	9	11	\$4,000
AH-3	01/01/2036	10	15	\$5,000
AH-3 > HP-3	01/01/2031	10	10	\$4,000
AH-4	01/01/2029	20.01	8	\$6,000
AH-4 > HP-4	01/01/2020	31.02	-1	\$6,500

# Capital Forecasting

Gain replacement dates, replacement costs, and expected lifespan for your critical assets to better plan for the future.

- + Develop accurate budgets for capital replacement costs.
- + Anticipate and prepare for costs by category, equipment type, or location.
- + Secure funding with data-backed planning and reports.

1 Year Replacement Cost

5 Years Replacement Cost

10 Years Replacement Cost

Next Year Replacement Cost

**\$107,500**

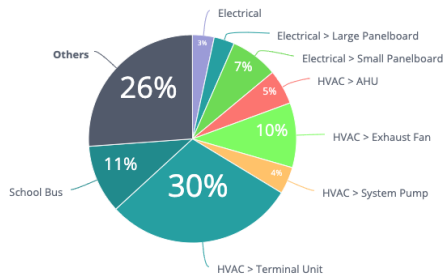
Next 5 Years Replacement Cost

**\$977,803.6**

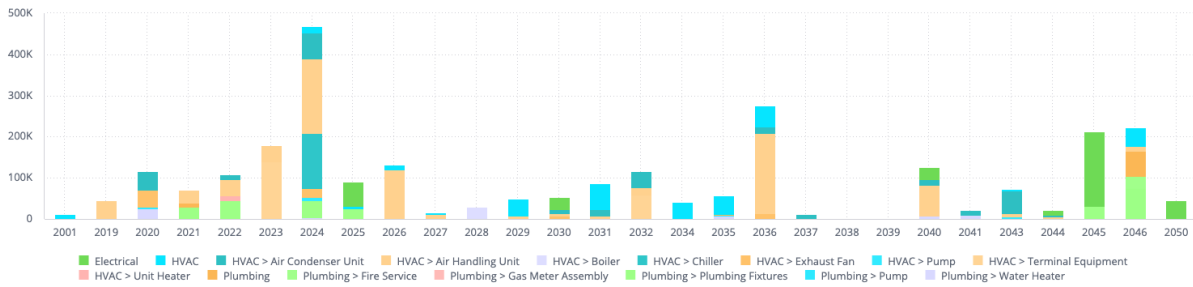
Next 10 Years Replacement Cost

**\$1.2M**

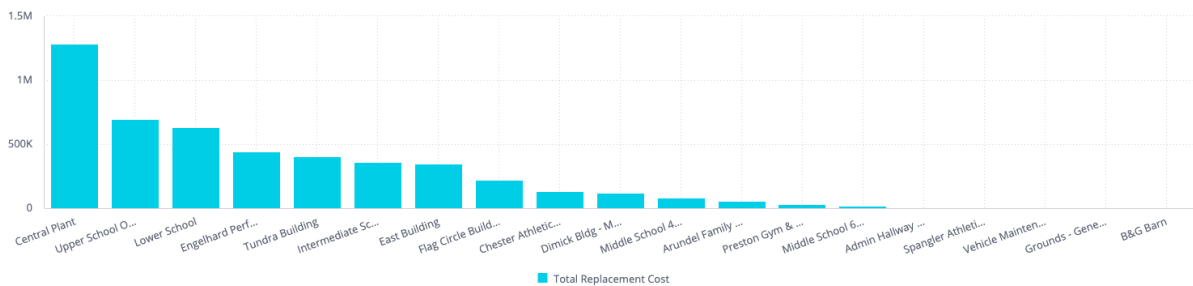
Equipment Type



Replacement Cost Projection



Replacement Cost Per Building



## Planned Maintenance Recommendations

Gain professionally recommended planned maintenance schedules and instruction sets for your building systems.

- + Ensure your critical assets are receiving recommended routine maintenance.
- + Extend the life of your assets to lower operational costs.
- + Closely monitor and service high-risk assets, preventing problems before they occur.

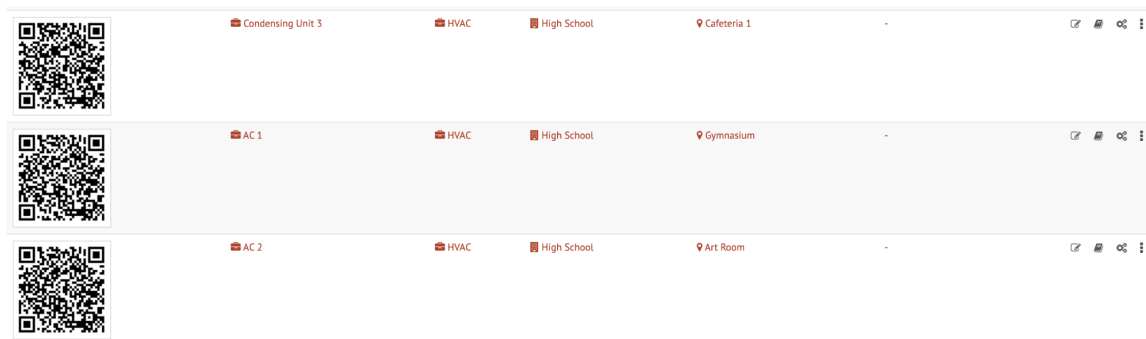
- \* Step 1.  1. De-energize power source to equipment in accordance with lockout/tag-out procedures.
- \* Step 2.  2. Lubricate or grease all fittings.
- \* Step 3.  3. Check drive shaft coupling for excessive wear or play.
- \* Step 4.  4. Check for evidence of leaking seals.
- \* Step 5.  5. Verify proper building loop pressure, adjust make up regulator and expansion tank as needed
- \* Step 6.  6. Remove lock, safety tags and return equipment to normal operation.

## Interacting Mapping\* & Asset Tagging

Gain QR coding and location data on your assets to sync with your current equipment list.

- + Quickly scan QR codes to save time pulling up details on an asset.
- + Identify assets on a map for quick navigation or identification.
- + Give outside vendors all the details they need to find and service an asset.

\*Interactive mapping requires a separate purchase.



Floorplans

Find Equipment

Backflow Preventer

Filter Equipment By Type

Electrical, Plumbing

- Access Control
- Electrical
- Elevator
- Fire Extinguisher
- Furnishings/Loose Equipment
- Generator
- HVAC
- Kitchen Equipment
- Plumbing
- Utilities

Floorplans

≡ Floorplans

≡ Electrical, Plumbing

# FCA Details

	<b>Baseline Condition</b>	<b>Capital Planning</b>	<b>Operations Maintenance</b>
All information entered in FMX Software	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Equipment Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Equipment Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mfg/Model/SN Information*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Nameplate or Estimated Capacity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Observed Condition	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Interactive Mapping (requires a separate purchase)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Equipment Photographs		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Service Life Remaining		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Operational Life Remaining (Calculated from Model/SN)*		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Estimated Replacement Cost		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Capital Planning Schedule		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Equipment QR Tagging		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Planned Maintenance Timing (Monthly, Quarterly, Annually)			<input checked="" type="checkbox"/>
Planned Maintenance Instruction Sets by Equipment Type (AHU, EF, RTU, etc.)			<input checked="" type="checkbox"/>

## Items Assessed

Scope items	Photos taken	Condition assessed	Replacement cost estimated	Replacement date estimated	QR code applied
Rooftop air handling units	✓	✓	✓	✓	✓
Indoor air handling units	✓	✓	✓	✓	✓
HVAC circulating pumps	✓	✓	✓	✓	✓
Boilers	✓	✓	✓	✓	✓
Chillers	✓	✓	✓	✓	✓
Cooling Towers	✓	✓	✓	✓	✓
Unit heaters (representative sampling of accessible units)		Yes, off known age from customer provided mechanical drawings and prior assessments	✓	✓	
Fan coil units/heat pumps (representative sampling of accessible units)		Yes, off known age from customer provided mechanical drawings and prior assessments	✓	✓	
Variable air volume (VAV) terminal units (representative sampling of accessible units)		Yes, off known age from customer provided mechanical drawings and prior assessments	✓	✓	
Unit ventilators	If accessible	✓	✓	✓	
Exhaust fans	If accessible	✓	✓	✓	

Main switch gear	✓	✓	✓	✓	✓
Backup generators	✓	✓	✓	✓	✓
Domestic water heaters (40 gallons and larger)	✓	✓	✓	✓	✓
Other Major MEP Equipment	If accessible	✓	✓	✓	✓

\*If information is legible

## FAQ

### **What is required from my organization to provide a quote?**

We simply need the following information to provide a quote:

- Number, size (square footage), and type of buildings to be assessed
- Desired assessment package
- Any custom scope items

### **What is required from my organization to perform the assessment?**

We request that you provide access to all spaces containing equipment to be assessed, and assign a member of your staff to accompany our team. In addition, building drawings can make the process much more efficient. If these are available we will request that you provide us with them as early in the process as possible. Ideally, we would like to receive and review them prior to sending our team on-site.

### **How long does an assessment take?**

This varies based on the scope of the assessment and package selected. A reference point would be 250,000 square foot building with the Capital Planning package. The assessment will typically require 3 days on-site and an additional week back at the office.

### **Is your team insured?**

Yes, the assessment time is fully insured. Liability insurance certificates can be provided upon request.

### **Can we add items to the assessment scope?**

Yes, however, fees will apply. Depending on the items being added we may also need to bring in third-party sub-contractors for their expertise. FMX will manage these relationships to ensure success.

### **What are the deliverables?**

After your assessment is complete, you will have access to all data from your FMX site. Depending on the package selected, you will also have a custom dashboard for capital forecasting (Capital Planning Package) and a list of Planned Maintenance tasks (Operations and Maintenance Package). Typically, hard copy reports are not provided as part of the standard scope. These can be added for a fee if desired.

### **Are travel/lodging costs included?**

All travel-related expenses are included in the assessment fee.