

Inside

Private School Management

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Is There a Facilities Audit in Your Future?

As many schools are building new buildings and modernizing their facilities, the role of managing the physical plant is growing. And so is the anxiety level of many business managers. How can one keep

conduct a facilities audit. "A facilities audit is like a medical physical for your physical plant," says Bill Keslar, president of Building Solutions, a Dallas-based firm that specializes in conducting facilities audits for private schools. Piel thinks of a facilities audit in the same way he views a financial audit. "A school's buildings, just like its finances, need a hard look periodically by an outside observer who can bring both expertise and objectivity to the situation," he believes.

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What Is a Facilities Audit?

A facilities audit is a thorough examination of a school's entire physical plant to assess the buildings' physical condition in a detailed way that will provide a school with concrete information about what exactly should be done and when, to ensure safe, well-functioning facilities, Keslar explains. A facilities audit includes an examination of paving, drainage, irrigation, waterproofing, structural and mechanical systems, and plumbing. Also evaluated are electrical systems, fire protection, interior conditions, and accessibility. Playgrounds, pools, athletic facilities, and kitchens are also examined.

track of all the repairs and replacements that are needed immediately, in the short term, and in the long term?

It's a tough job, one that Ken Piel found very stressful during his tenure as business manager at Greenhill School in Dallas. As the complexity of his school plant kept increasing, "I was always wondering what repair or replacement was in most urgent need of attention at the moment," he recalls. He knew, of course, that focusing only on what was most dangerous or most likely to break was no way to keep facilities in top condition. But to monitor all facilities components seemed impossible.

Private school business managers all over the country have experienced similar frustrations. And some are dealing with the problem by hiring an outside expert to

Facilities Audits Get High Marks

While only a small minority of schools thus far have conducted facilities audits, business managers give the process rave reviews. "I only regret that I had a facilities audit done so late in my time at Greenhill," notes Piel. "Of all the out-



sourcing I did over a period of many years, the facilities audit is the only outsourcing I did that I can fully endorse," says Piel, who is now vice president of the Education Group, a Dallas-based administrative search service. "Having the audit done lifted a huge anxiety from me."

One of the most important benefits of a facilities audit, according to Vance Ulsh, operations director at St. Francis Episcopal School in Houston, "is that it gives us the ability to plan." Ulsh is glad he has a document that tells him how long all of his facilities systems and their components will last and when they must be replaced.

Since some equipment and systems in any school have probably been in place longer than the business manager, he or she may have little idea of when, for example, individual air conditioners should be replaced. But with a facilities audit team going over all equipment carefully, a reliable estimate can be made regarding the life remaining for individual air conditioners as well as for most other equipment in a school.

Another advantage to having a facilities audit done, according to Keslar, is that the building and grounds staff can learn a great deal from the team of experts conducting the audit.

A facilities audit also includes price estimates for doing the work that needs to be done to maintain facilities — repairs and replacements. "The report resulting from the audit, complete with cost estimates for all the work that is needed over the next several years helped me with my Provision for Plant Replacement, Renewal, and Special Maintenance (PPRRSM) planning," Piel states. And with a well-documented report in hand describing just what needs to be done when, the business manager can make a more effective case for setting aside needed funds to meet plant maintenance needs. "Without such a document," says Keslar, "it can be all too easy to put more exciting things, like new educational programs ahead of needed — but unexciting — plant maintenance planning."

Piel was surprised at one benefit he noticed from having a facilities audit performed. The auditing process educated

the head of school and the development office about building issues, enabling both to effectively incorporate facilities issues into fundraising efforts.

It's Not Free

"A facilities audit is not cheap," says Ulsh, "but not knowing where you are in terms of what needs to be done to maintain facilities isn't cheap either." The cost is significant, admits Keslar, and depends on the size of the school campus. Smaller schools, he estimates, can expect to pay about \$3,000-\$5,000 per building, while larger schools may pay as little as \$1,500 per building. His firm, he reports, has charged few schools less than \$20,000 for a facilities audit, but rarely does the bill reach \$50,000.

Besides the size of the campus, there are other things that can affect the cost of a facilities audit. Older buildings, with their greater likelihood of problems, may raise the cost, while having had a safety audit or a building inspection done in the past can lower the cost.

A facilities audit should be updated periodically, probably every three to five years, say some who have had facilities audits at their schools. The first audit, the most extensive one, is likely to be the most expensive. If a first audit is well-used over the next few years, then subsequent audits should be less involved and less expensive. Of course new construction and major renovation will make subsequent audits more extensive.

Choosing a Facilities Auditor

The following hiring tips are offered by business managers and professional facilities auditors:

- Ask your peers at other schools for suggestions of good firms to hire.
- Carefully interview any facilities auditor before hiring. Make sure you have a clear understanding of the process the auditor will use to conduct the audit, and make sure the auditor will leave you with the information you need to do a good job of managing your facilities.
- Conduct reference checks. With such

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an expensive project, you can't afford not to.

- Make sure the firm you hire can gather expertise in the many different systems involved in your facilities. Ask to see the credentials of auditing team members.
- Make sure you hire a firm with experience in auditing schools.
- Ask to see a report that was prepared for another school that the firm audited. Look at the type of information included and how it's presented. Does it look helpful? Is it user-friendly?
- Get a price estimate for the entire job. Don't leave the final cost open-ended by agreeing to pay on an hourly basis.
- Look for an auditor who is inclined to teach you and your building and grounds staff. This way you can increase the value of your financial investment.
- Make sure the auditor you hire will include in the final report an analysis of the data the team found. For example, if the auditors found cracks in a wall, they should include in the report what the cracks mean, how they got there, how they should be handled and when, and the estimated cost.
- Ask that wherever in the report it would be helpful, that the auditor include a photo illustrating what is being explained. The existence of digital cameras should make it much simpler than in the past to include photos that could be clarifying for the reader.
- Stipulate that the auditing team will go over its final report with you and will help the business and plant managers present the facilities audit to the board.

Work Effectively With the Auditing Team

Once you hire a facilities auditing team, your work is not over; it has just begun. To ensure a smooth, efficient

auditing process, the school business manager will need to:

- Provide access to the people the auditors need to talk with. The auditing team will especially need ready access to the business manager and the plant manager throughout the several days of the auditing process.
- Make sure the auditing team knows as much about the facilities' history as possible. For example, how recently were the chillers replaced? Explain major repairs that have been made. If you can supply the auditors with building plans, the auditors' time won't be wasted taking measurements and gathering other background information before they can conduct their building assessments. Be as open as you can be about past engineering problems you've had to resolve.
- Hold an orientation meeting with the auditing crew before they begin fanning out around the campus to do their work. Distribute keys, establish procedures for getting into and out of spaces, and designate times when classrooms may be audited.
- Designate a 'homeroom' space for the auditing team — a place where team members can leave information for each other, meet to share observations, store their materials, etc.

The Report

The result of the auditing process should be a report that will serve as your school's facilities 'bible' for the next few years. Don't waste your investment by letting it sit on the shelf unused. ■