

A Facility Assessment Approach Everyone Can Afford



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Maybe you are updating your Strategic Facility Plan or don't have one and need a way to prioritize your facility investments.

This simple checklist can be used to do a quick and inexpensive self-assessment of your properties to identify those that need further evaluation or action.



Strategic Facility Assessment Overview

You can use this checklist to conduct a preliminary assessment of how well your facilities seem to fit your needs. This is intended to let you quickly identify what aspects of which facilities warrant further investigation. Then your management team can prioritize and select the actions that need to be done right away, and arrange the appropriate technical studies or improvement projects.

You might wonder whether there is any value in such a simple self-assessment as this. Because it provides a quick and economical overview of all your facilities, you get three main benefits:

- **A Plan Update:** This assessment provides a current update to your existing Strategic Facility Plan, especially in these times of rapidly changing business environments. If you do not have a facility plan, this assessment provides you with a key part of the information you need for informed decision-making. This kind of assessment can be done as frequently as needed.
- **Your Situation Summary:** This assessment and the simple table structure provides a visual summary of what you already know about your facilities and highlights those areas needing more information. You can then invest in that information you feel you need to have for some or all of your facilities.
- **Ability to Focus on Immediate Actions:** By clearly identifying facility needs and gaps in information, you can easily focus on those things that are most important for you to take action on right now. While it is great to know the whole picture, you only have the resources to tackle some of them today.

For more discussion on this topic, visit <https://ralstrategies.com/services-sfa.php>. If you do not have a Strategic Facility Plan, you will also need the following two components, when making decisions to determine if it is cost effective to renovate or relocate the facility based on its purpose:

1. Your Organization's Strategic Plan: What facilities do you need to support the organization's mission? Is this particular facility important for the immediate needs? Is it the right type of facility, in the right place, for the longer term needs?
2. A Total Cost of Ownership (TCO) Analysis: If this facility is appropriate (or can be made appropriate), is it a financial asset that benefits the organization? Are the planned financial investments favorable? Are the operational costs cost competitive?

Strategic Facility Assessment Instructions

Make as many copies of the checklist and notes sheets as you need. The intent of each column in the checklist is described below and you can further refine or adapt the categories for your organization.

Facility Name – A unique identification of the facility that will be commonly understood within your organization.

Date – The date this assessment was performed.

In SFP? – Does your organization have a Strategic Facility Plan (SFP)? If not, score this as “unknown.” If so, is that plan still valid and is this facility addressed in it?

Has CIP? – Is there a Capital Improvement Plan (CIP) for this facility?

If the facility is in your SFP and has a CIP, you should be able to skip ahead to the “Has BCP?” column.

Usage – Rate how crowded the facility seems to be, relative to others like it that you have. Just because all the space is used does not mean it is crowded, you need to evaluate whether things have just spread out to fill the available space or if the space is well used. After the evaluations, you will need to make a separate determination if more or less vacant space is warranted based on the projected growth or other changes in your operations.

Location – Rate how well located the facility is with respect to its purpose. If location is not important for this facility, score it as “good.”

Design – Rate how well the facility type and layout provide for safe and efficient work. Is the facility the right type for the current use (office building for office work) and does the configuration support productive work practices, or does it require inefficient activities because of the site/building layout?

Condition – Rate the quality of the facility condition. Identify if it is in obvious need of repair from observations, if the occupants report significant problems, if it is not up to the organization’s quality standard or reflects an inappropriate image (too nice, too run-down).

Sustain. – Rate how well the facility meets your organization’s sustainability objectives, from basic energy efficiency to more progressive measures.

Security – Rate the adequacy of the physical security with respect to the type and location of the facility.

Has BCP? – Is there a Business Continuity Plan (BCP) for the operations supported by this facility in the event of disaster or damage?

Has SOP? – Are all the proper and appropriate Standard Operating Procedures (SOP) in place for this facility? This includes Service Level Agreements (SLAs), and site-specific procedures such as spill plans and special event procedures.

Note # – The number of any associated note(s) on the associated notes page.

Strategic Facility Assessment Checklist

List each property name, then circle a “score” in each column based on what you know from available information or your subjective assessment from observations/verbal reports. Log the date and add notes describing the source or reason for any rating that is not “OK” or “Unknown.”

Facility Name	Date	In SFP?	Has CIP?	Usage	Location	Design	Condition	Sustain.	Security	Has BCP?	Has SOP?	Note #
		Yes Unknown No	Yes Unknown No	Empty OK Crowded	Good Unknown Poor	Suitable OK Problems	Good OK Problems	Good Unknown Needs	Adequate Unknown Problems	Yes Unknown No	Yes Unknown No	
		Yes Unknown No	Yes Unknown No	Empty OK Crowded	Good Unknown Poor	Suitable OK Problems	Good OK Problems	Good Unknown Needs	Adequate Unknown Problems	Yes Unknown No	Yes Unknown No	
		Yes Unknown No	Yes Unknown No	Empty OK Crowded	Good Unknown Poor	Suitable OK Problems	Good OK Problems	Good Unknown Needs	Adequate Unknown Problems	Yes Unknown No	Yes Unknown No	
		Yes Unknown No	Yes Unknown No	Empty OK Crowded	Good Unknown Poor	Suitable OK Problems	Good OK Problems	Good Unknown Needs	Adequate Unknown Problems	Yes Unknown No	Yes Unknown No	
		Yes Unknown No	Yes Unknown No	Empty OK Crowded	Good Unknown Poor	Suitable OK Problems	Good OK Problems	Good Unknown Needs	Adequate Unknown Problems	Yes Unknown No	Yes Unknown No	
		Yes Unknown No	Yes Unknown No	Empty OK Crowded	Good Unknown Poor	Suitable OK Problems	Good OK Problems	Good Unknown Needs	Adequate Unknown Problems	Yes Unknown No	Yes Unknown No	
		Yes Unknown No	Yes Unknown No	Empty OK Crowded	Good Unknown Poor	Suitable OK Problems	Good OK Problems	Good Unknown Needs	Adequate Unknown Problems	Yes Unknown No	Yes Unknown No	
		Yes Unknown No	Yes Unknown No	Empty OK Crowded	Good Unknown Poor	Suitable OK Problems	Good OK Problems	Good Unknown Needs	Adequate Unknown Problems	Yes Unknown No	Yes Unknown No	
		Yes Unknown No	Yes Unknown No	Empty OK Crowded	Good Unknown Poor	Suitable OK Problems	Good OK Problems	Good Unknown Needs	Adequate Unknown Problems	Yes Unknown No	Yes Unknown No	
		Yes Unknown No	Yes Unknown No	Empty OK Crowded	Good Unknown Poor	Suitable OK Problems	Good OK Problems	Good Unknown Needs	Adequate Unknown Problems	Yes Unknown No	Yes Unknown No	

Notes:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____
