

# USING FACILITIES ASSESSMENTS

A RESOURCE FROM THE CENTER FOR CONGREGATIONS

**H**ow much longer will our roof last? Are we using the most efficient heating and cooling system? What are the first steps to begin the renovation process on that old education wing?

Congregations are often full of questions about how to best maintain and repair their sacred spaces. From the nuts and bolts of a good electrical system to the more abstract concepts of planning space for the future, a full assessment of the facility and all of its parts is an invaluable tool for congregations.

## WHAT IS A FACILITIES ASSESSMENT?

**Alias.** Although known by many names (facilities survey, conditions assessment, conditions survey, facility conditions assessment), the facilities assessment is a holistic overview of your building's condition by an appropriate team of professionals who assess the current condition of the structure and its components.

**Maintaining history.** Those wanting to repair a historical building or to restore it to its original splendor may want to invest in a historic structure report. This type of facilities assessment goes into the history of the building, original materials used, and how the building has evolved, changed or was altered through the years.

**Assessing and planning.** A master plan report is another type of facilities assessment. To complete this report, the assessor looks at the future space uses of the building.

## WHY DO WE NEED A FACILITIES ASSESSMENT?

**Bird's-eye view.** Facilities assessments take a wide view of your facilities. Congregations need to know the condition of their existing facilities so they can best make decisions and plans for the future. It is not cost efficient to respond to problems one at a time. All systems in a building interact, so it makes sense to consider their overall as well as individual needs.

**Better planning.** Congregations can better apply their resources if they have the whole picture. Knowing the size and scope of a repair project assists with fundraising, planning, scheduling and other aspects.

**A TYPICAL FACILITIES ASSESSMENT** includes most of the following: Introduction, brief history of construction and maintenance, summary of findings, description of existing conditions, causes of problems, recommendations and remarks, cost estimates, photographs, drawings, and optional reports from various specialists, such as structural engineer, stained glass consultant, mechanical or electrical engineer, etc.

**Focus your energy.** Congregations want to make the most of what they have. A facilities assessment lets you know where you need work — maintaining areas in good condition and putting energies into the areas that need attention to be more time and cost efficient.

**Staying or moving?** A congregation considering a move may want to invest in a facilities assessment. A review of your current location can be an important component in making this difficult decision.

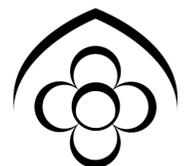
**Ongoing assessment.** Be an “educated consumer” by performing your own ongoing assessment. Keeping up on maintenance concerns can save time and money.

## WHO DOES FACILITIES ASSESSMENT?

**Leading the charge.** Most facilities assessments are led by an architect but are performed by a team of professionals with expertise in the areas of heating and cooling, electrical, flooring, roofing, windows, structure, etc. The building assessor assigns the various components of the building to the person with the appropriate knowledge.

**Finding your assessor.** Congregations can search a variety of sources to find the right person for the job. Check with other congregations, your denominational office, local historical groups, such as the Historic Landmarks Foundation of Indiana, or local nonprofit organizations, such as the Center for Congregations.

**Narrow the field.** Once you have recommendations from the above sources, begin sorting through those you would like to interview. Look for assessors who have qualifications and experience with buildings or facilities like yours. Interview at least three of the candidates.



Check references. Trust your instincts – choose the person who has “chemistry” with your congregation.

### ARE WE READY FOR AN ASSESSMENT?

**The committee.** Have a committee or team in place to work with your building consultant. This group can be about eight people – small enough to be manageable, but not so small that its members are easily overworked. Team members don’t need construction or maintenance knowledge. Anyone who is dedicated and passionate about the congregation makes a great addition to the committee.

**Select a spokesperson.** Appoint one team member to be the committee’s communicator. Frustration can mount if the assessor is getting instructions from different sources.

**Be prepared.** The more information you can provide to the assessor, the less expensive and more complete the assessment will be. Have ready any drawings or blueprints of the building or additions, maintenance records, historical documentation, photographs, records of renovation or restoration. Much of this may be available through your local historical society, previous contractors, state or county offices or denominational office. Providing this additional data can save the cost and effort of an “exploratory demolition,” which is breaking through the walls or roof to investigate what is going on within the structure.

**Communicate.** Keep the lines of communication open. The team needs to feel comfortable talking with each other and with the architect. A smooth give-and-take with the assessor makes his or her job easier and keeps everyone informed throughout the process.

### WE HAVE AN ASSESSMENT, NOW WHAT DO WE DO?

**Study the report.** It is best if the assessor walks the maintenance or capital project committee through his or her findings and recommendations. The architect can answer questions and provide additional explanation if needed.

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**Using Facilities Assessments** is part of the Using Resources series, which is published by the Center for Congregations to help congregations make effective use of specific kinds of resources. It is our hope that you will find them useful in your work as a congregation.

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**Spread the word.** Let the congregation know what is in the assessment – areas that need work, recommendations and cost estimates. It may take some time to process the information before it is accepted and members are ready to begin the planning phase.

**Plan of action.** The final report usually includes phasing or staging the work needed, based on the information the congregation provided about the availability and timing of funds. Once the congregation is comfortable with the scope and cost of the project, the assessor can develop a plan, help locate good contractors for the congregation to consider, and oversee the work once contracts are signed and the project begins.

**File it in a safe place.** Keep the assessment report for future reference. It will be helpful if work needs to be done at a later time, or as historical documentation for the next assessment.

## Resources You Can Use

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For resources on this subject, check out the Congregational Resource Guide (CRG) at <http://thecrg.org/>. Suggested CRG search terms: assessments, facility assessments, building, construction, facility inspection.

Center staff are happy to talk to you about facility assessments or other topics. You can contact the Center office nearest you or email [info@centerforcongregations.org](mailto:info@centerforcongregations.org).

