



Indianapolis  
Center for  
Congregations, Inc.

# using RESOURCES

## *Taking a Closer Look: Using Facilities Assessments*

**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, facilities audit or conditions audit), the facilities assessment is a holistic overview of your facility's condition by an appropriate team of professionals who assess the current condition of the building 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. In this report, the assessor uses history as a basis for making decisions about the future.

**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. This report incorporates strategic planning aspects into the assessment.

### 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.

**Focus your energy.** Congregations want to make the most of what they have. A facilities assessment lets you know where you need work. If you know what parts of the building

are in good condition, you can maintain those areas with minimal effort and put your energies into the areas that need attention. The assessment helps you to be more time and cost efficient. The results can sometimes be surprising. It is worth the cost to get a clear picture of your buildings' needs.

**Staying or moving? A** congregation considering a move may want to invest in a facilities assessment. An audit 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. Even the sturdiest of buildings needs regular maintenance and repair. Ongoing assessment involves checklists of needed tasks, keeping up on required maintenance, being aware of emerging problems, and organizing a small committee to regularly discuss maintenance concerns. Congregations can save time and money by knowing their buildings and keeping up on the issues. A \$500 problem can quickly escalate into a \$5,000 or \$50,000 problem if it is not addressed in a timely fashion.

### 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 Indianapolis 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 communicator for the committee. Frustration can mount if the assessor is getting instructions from many 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. No matter how old the documents, they are still helpful. If the information is not in hand, it may be available through your local historical society, previous contractors, state or county offices or denominational office. If enough historical or maintenance data is not available, architects may have to do "exploratory demolition." This involves breaking through the walls or roof or other areas to investigate what is going on within the structure. It's worth it to spend the additional time to find documentation.

**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.

**Spread the word.** Let the congregation know what is in the assessment – areas that need work, recommendations and cost estimates. The information may be surprising to members. 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.

Sources for this piece include A. Robert Jaeger and Tuomi Forrest of Partners for Sacred Places; Jerry Cripps of InterDesign; Kevin Rose from Cumberland First Baptist Church; and the article Special Report: Building Conditions Surveys by Kim Lovejoy, *Common Bond* magazine, June 1998, (can be found at [www.sacredplaces.org](http://www.sacredplaces.org)).

## A typical facilities assessment will include 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, sketch or measured
- Optional reports from various specialists, such as structural engineer, stained glass consultant, mechanical or electrical engineer, etc.

### *Managing Repair and Restoration Projects* by Shari P. Goldberg

This resource is written specifically for lay people working to preserve their houses of worship. It offers step-by-step details for assessing the building, planning the work, handling contracts and overseeing construction, including an example on page 52 of a conditions survey. The book includes other sample documents, as well, and a glossary and a list of resources.

### Partners for Sacred Places [www.sacredplaces.org](http://www.sacredplaces.org)

Partners for Sacred Places is a nonprofit organization devoted to helping Americans care for and make good use of older and historic religious properties. Partners maintains an Information Clearinghouse, accessible from its website, which contains extensive building-related resources. Many of the resources are available free online. Partners also publishes resources related to property maintenance and fundraising.

### *Special Report: Building Conditions Surveys* by Kim Lovejoy

<http://www.sacredplaces.org/PSP-InfoClearingHouse/articles/Special%20Report.htm>

This informative article found on the Partners for Sacred Places website and published in *Common Bond* magazine discusses the facilities assessment. The article addresses the scope of the survey, funding the assessment, finding a consultant, communicating the results, and more.

Additional resources can be found on the *Congregational Resource Guide* at [www.congregationalresources.org](http://www.congregationalresources.org). The Indianapolis Center for Congregations is happy to suggest resources and consultants to your congregation or converse with you about your consulting needs. Call 317-237-7799 or email [info@centerforcongregations.org](mailto:info@centerforcongregations.org).