

### STEP 1

#### Define the Scope of Work to be Performed

- Comprehensive Facility Management
- Operations & Maintenance – Building/Equipment/Systems
- Renovations/Installations, Capital Projects
- Building Services – Life-Safety/Custodial/Grounds Maintenance
- Office and Administrative Services – Shipping Receiving/ MailRoom/ Dispatch/Reception/Phones/AV/Conference Room Set-Up

### STEP 2

#### Gather Relevant Building/Facility Data

- Size, Age, Condition, Specialized Areas [Labs, Research/Testing Areas, Data Centers, etc.], Critical Services, Operating Hours, Site Data [acreage, landscaping, parking, fencing]
- Equipment – Type, Age, Size, Model#, Condition

### STEP 3

#### Gather Historical and Current Operating Data

- Current Operating Budget
- Materials/Parts Spend
- Typical Work Orders Issued/Calls Received [daily/monthly/annually]

### STEP 4

#### Gather Labor Data

- Current Staffing Levels [Positions/Skills, Shifts/Hours, Union/Non-Union, Current size and skills, On-Site vs. On-Call]
- Customer Satisfaction with the Current Staffing Level and Skills
- Copy[ies] of Current Union Agreement [if applicable]
- Licenses/Training Required for Staff to Operate Equipment or Systems
- Background Security Checks, Drug Screening Required

### STEP 5

#### Gather Facility Subcontract Data

- Existing Specification/Contracts
- Current Vendors/Contact Information/Prices
- Customer Satisfaction with the Current Subcontracts
- Are Subcontracts to be owned by Customer and Managed by the Service Provider or are they to be owned by the Service Provider

### STEP 6

#### Determine What Warranties or Maintenance Agreements are in Effect

### STEP 7

#### Assemble List of Tools, Materials and Equipment

- Listing – Will existing Stock and Tools be available to Service Provider
- Ownership [Customer/Service Provider]
- Materials [expended/stocked]

### STEP 8

#### Assemble Information about Current Method of Work Order Administration

- Computer Maintenance Management System – CMMS [Customer/Service Provider]
- Maintenance Tasking and Manpower Scheduling
- Ownership [Customer/Service Provider]
- Web-Based or Internal

### STEP 9

#### Evaluate Current Level of Maintenance and Condition of Building Equipment, Systems

- Overall Equipment Condition Evaluation
- Any Specialty Equipment
- Criticality
- Operating Environment Office/High Security/Laboratory/Clean Room/Manufacturing/Warehouse/Public Areas
- Customer Satisfaction with the Current Level of Maintenance

### STEP 10

#### Review Documentation

- As-Built Drawings/Plans
- O&M Manuals/Specifications
- Preventive Maintenance Tasking Schedules
- Flow Diagrams
- Material/Tool Lists