

# CITY OF FORT LAUDERDALE

## FACILITIES CONDITION ASSESSMENT

RFP NO. 545-11286

RESPONSE TO REQUEST FOR PROPOSAL

OCTOBER 3, 2013



2165 WEST PARK COURT, SUITE N  
STONE MOUNTAIN, GA 30087  
800.881.ISES  
WWW.ISESCORP.COM

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7. Q. Can the building list be provided in an excel file.  
A. The REVISED building list has been provided in an excel file. Disregard the original building list and use the REVISED building list.

All other terms, conditions, and specifications remain unchanged.

AnnDebra Diaz, CPPB  
Procurement Services Division

Company Name: ISES Corporation  
(please print)

Bidder's Signature: 

Date: September 30, 2013

## BID/PROPOSAL SIGNATURE PAGE

**How to submit bids/proposals:** Proposals must be submitted by hard copy only. It will be the sole responsibility of the Bidder to ensure that the bid reaches the City of Fort Lauderdale, City Hall, Procurement Department, Suite 619, 100 N. Andrews Avenue, Fort Lauderdale, FL 33301, prior to the bid opening date and time listed. Bids/proposals submitted by fax or email will NOT be accepted.

The below signed hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a contract if approved by the CITY and such acceptance covers all terms, conditions, and specifications of this bid/proposal.

**Please Note:** All fields below **must** be completed. If the field does not apply to you, please note N/A in that field.

Submitted by:  September 30, 2013  
(signature) (date)

Name (printed) Edward H. Gee Title: President

Company: (Legal Registration) ISES Corporation

**CONTRACTOR, IF FOREIGN CORPORATION, MAY BE REQUIRED TO OBTAIN A CERTIFICATE OF AUTHORITY FROM THE DEPARTMENT OF STATE, IN ACCORDANCE WITH FLORIDA STATUTE §607.1501 (visit <http://www.dos.state.fl.us/>).**

Address: 2165 West Park Court, Suite N

City: Stone Mountain State: Georgia Zip: 30087

Telephone No. 770.674.3110 FAX No. 770.879.7825 Email: gee@isescorp.com

Delivery: Calendar days after receipt of Purchase Order (section 1.02 of General Conditions): Per Section 03 of RFP, it is estimated that it will 255 days until delivery of 100% completion.

Payment Terms (section 1.04): Net 30 days Total Bid Discount (section 1.05): N/A

Does your firm qualify for MBE or WBE status (section 1.09): MBE X WBE \_\_\_\_\_

**ADDENDUM ACKNOWLEDGEMENT** - Proposer acknowledges that the following addenda have been received and are included in the proposal:

<u>Addendum No.</u>	<u>Date Issued</u>
1 (number according to BidSync), Prebid Sign-in Sheet	September 19, 2013
1 (number according document), Q&A	September 24, 2013
REVISED Attachment B_Facility List.xls	September 24, 2013

**P-CARDS: Will your firm accept the City's Credit Card as payment for goods/services?**

YES \_\_\_\_\_ NO X

**VARIANCES:** State any variations to specifications, terms and conditions in the space provided below or reference in the space provided below all variances contained on other pages of bid, attachments or bid pages. No variations or exceptions by the Proposer will be deemed to be part of the bid submitted unless such variation or exception is listed and contained within the bid documents and referenced in the space provided below. If no statement is contained in the below space, it is hereby implied that your bid/proposal complies with the full scope of this solicitation. **HAVE YOU STATED ANY VARIANCES OR EXCEPTIONS BELOW? BIDDER MUST CLICK THE EXCEPTION LINK IF ANY VARIATION OR EXCEPTION IS TAKEN TO THE SPECIFICATIONS, TERMS AND CONDITIONS.** If this section does not apply to your bid, simply mark N/A in the section below.

Variances:

\_\_\_\_\_

revised 6-16-11

**NON-COLLUSION STATEMENT**

By signing this offer, the vendor/contractor certifies that this offer is made independently and free from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

**3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).**

3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

**Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.**

**NAME**

**RELATIONSHIPS**

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**In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.**

## PART VII - PROPOSAL PAGES – COST PROPOSAL

Proposer Name ISES Corporation

Proposer agrees to supply the products and services at the price bid below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: Contractor must quote firm, fixed, cost for all services identified in this request for proposal. This firm fixed cost includes any costs for travel to the City. No other costs will be accepted.

**Failure to use the City's COST PROPOSAL Page and provide costs as requested in this RFP, may deem your proposal non-responsive.**

TOTAL LUMP SUM COST \$156,497

Attach as a separate page, a total cost breakdown of the lump sum cost.



October 3, 2013

City of Fort Lauderdale  
Procurement Services Division  
Room 619, City Hall  
100 North Andrews Avenue  
Fort Lauderdale, FL 33301

**RE: LETTER OF INTEREST FOR PROVIDING FACILITIES CONDITION ASSESSMENT SERVICES FOR THE CITY OF FORT LAUDERDALE, AS DESCRIBED IN RFP #545-11286**

To Whom It May Concern:

ISES Corporation is pleased to submit herewith our Letter of Interest in providing a Facilities Condition Assessment (FCA) for the City of Fort Lauderdale's, Parks and Recreation Department. It is our understanding that the City's Facilities Division is seeking a qualified firm to evaluate select assets and determine current and upcoming needs, along with budget estimates to aid with capital improvement planning.

ISES Corporation is a facilities engineering consulting firm that offers an extensive portfolio of services to facility owners. We are a minority-owned, small business concern that is solely owned by the President and Founder, Edward H. Gee. We were established in 1987 with a primary mission of providing facility condition assessment and consulting services. We have continued this mission throughout our 26-year history and are the leading provider of facilities condition assessments across the nation. Our nationwide client base includes federal, state and local government entities, higher education, healthcare and research institutions, laboratories, as well as private sector and institutional clients. ISES is dedicated to helping our clients improve the quality of both their facility portfolio and their delivery of facility management services.

The ISES FCA inspections will be visual and non-destructive, and the data gathered will be utilized to develop a comprehensive condition assessment report for the City. ISES personnel will request interviews with the building maintenance staff to investigate concerns. Our experienced inspection teams will identify not only what is currently deficient, but what is expected to require attention within the next ten years based on existing conditions, industry averages, and anticipated lifecycle failures. Each identified element will be prioritized and have an estimated budget cost. We will also address deficiencies as they relate to building code changes (particularly fire safety issues). All data relative to the FCA report will be developed in, and contained within, the ISES AMS (Asset Management System) web-enabled database. ISES will host this database system on our servers, and City of Fort Lauderdale personnel will have access to the system via the Internet. The finished product FCA report will contain a comprehensive listing of prioritized and estimated recommendations to bring the facilities to modern standards without any expectation of change to facility space layout or function. Identified facility deficiencies will be documented using digital photography, and all non-recurring needs will be located on CAD floor plans (if provided by the owner).

Jon Thomas, PE will be the assigned Project Manager for the FCA inspections. Jon is the Director of Special Operations at ISES and has been with the company for more than 15 years. He has conducted and managed Facility/ Infrastructure Condition Assessment projects and Strategic Planning programs and processes for numerous US government locations, colleges, universities, and corporations. His experience also includes

delivery of high quality Lifecycle Component and Equipment Inventory programs. He will lead teams of professional architectural and engineering inspectors that have worked together on a multitude of FCA projects. As a privately-held corporation and small business, we are nimble and responsive. Our commitment to both service and quality are reflected by the fact that more than 60 percent of our annual business volume is in the form of repeat work from existing clientele. We have maintained close support relationships with our clients over the years, in some cases extending for more than 20 years. This level of extended client relationship would not be possible absent the provision of outstanding customer service on the part of the ISES professional staff.

As President of ISES Corporation, I hereby declare that the only person(s), company or parties interested in the proposal as principals are named herein; that the proposal is made without collusion with any other person(s), company or parties submitting a proposal; that it is in all respects fair and in good faith, without collusion or fraud; and that I have full authority to bind ISES Corporation in contract.

Thank you for considering ISES Corporation for this project. Please let me know if you have any questions. You may reach me at 770.674.3110 or gee@isescorp.com. We are excited about the opportunity to work with you.

Very respectfully,



Edward H. Gee  
President

*This proposal was printed entirely on 100% post consumer waste recycled paper.*



## STATEMENT OF PROPOSED SERVICES

ISES proposes to perform a comprehensive Facility Condition Assessment (FCA) study for the City of Fort Lauderdale, Facilities Division, Parks and Recreation Department, also referred to as the Client and the City. Overall, the study will include 140 facilities encompassing approximately 1,778,375 gross square feet.

Proper stewardship of a facilities portfolio includes long-range facility renewal planning. Such planning requires knowledge of the current condition of the portfolio of assets. The FCA provided by ISES Corporation establishes the necessary baseline for proper planning to occur.

As a result of retaining ISES to conduct an FCA on your asset portfolio, you will be able to:

1. Recognize, in snapshot and detail formats, the condition of each facility, analyzed both separately and in comparison to other assets in your portfolio,
2. Appreciate, at a glance and in depth, the condition to which the portfolio should be maintained, and
3. Evaluate the required level of facility renewal funding necessary to maintain and upgrade the assets in accordance with the standards applied.

### Facility Evaluation

Upon receiving Notice to Proceed, the Project Manager will carefully review the scope of work, as outlined in the Request for Proposal, and request preliminary information to help the teams prepare for the field inspections. During the kickoff meeting, the scope of work will be reviewed with the client to ensure full understanding by all parties, calibrate expectations, and deal with housekeeping issues, such as security and building escorts. Very often, the entire ISES field inspection team participates in the meeting and additional client contacts are invited as well, to minimize any opportunity for misunderstanding and confusion. Clear expectations regarding the end product report are articulated and recorded. The outcome of these discussions is communicated to the Director of Quality Assurance at ISES, to ensure that the final report meets client requirements.

In addition to physically assessing the buildings, ISES personnel will evaluate client-supplied data and interview key client personnel to develop an accurate portrayal of existing asset conditions. Each asset will be inspected by a two-person team, which consists of an experienced architectural inspector and an experienced engineering inspector. They will inspect the various components in each building, including an evaluation of the mechanical, electrical, and plumbing systems, structural architectural components, vertical transportation systems, the immediate site (10 feet) surrounding the facility, and utilities as they relate to each asset in the study. Evaluation of resource conservation opportunities and compliance with ASTM E2018-8 are included within this survey work scope.

### Report Development

All renewal needs are estimated and then indexed to local conditions, and markups are applied as the situation dictates. As part of the FCA, ISES provides a full photographic record of the physical inspection of the building. Both the photos and CAD drawings are integrated with the database and included in the published facility report.

Once the baseline condition of each facility has been established through the FCA process, the built-in modeling capability of the ISES AMS allows you to forecast funding requirements to meet target condition goals. ISES will

work with the Client to develop several funding scenarios based on differing targets. Using the modeling function, the required levels of funding to achieve target conditions can be established.

## Facility Condition Needs Index (FCNI)

The FCNI provides a lifecycle cost comparison. It is a ratio of renewal costs over ten years (including deferred renewal) to the current replacement value of the asset. The current replacement value is based on replacement with present construction standards for the facility use type, and not original design parameters. This index gives the City a comparison within all buildings for identifying worst case/best case building conditions.

$$\text{FCNI} = \frac{\text{Renewal Costs}}{\text{Current Replacement Value}}$$

FCNIs that are greater than 1.0 indicate that the sum of the estimated cost of renewal needs recommended to restore the facility to like-new condition is greater than the hard costs to replace the building.

## Facility Condition Index (FCI)

The FCI is a ratio of the deferred renewal costs to the current replacement value.

$$\text{FCI} = \frac{\text{Deferred Renewal}}{\text{Current Replacement Value}}$$

## CRV Calculation

ISES traditionally calculates Current Replacement Value using a cost per gross square foot based on building size and use (e.g. theater, research lab, classroom building, etc.). We utilize R.S. Means Section Square Foot costs as the starting point. This starting base number is adjusted for the size of the facility and modified with city cost indices to the local area, with appropriate modifiers for professional fees and demolition of existing structure added. Our standard methodology will prorate the base cost per GSF based on different use types in a building. Traditional methods of calculating CRV do not take into account the historic significance of a structure as replacement of a historic structure would only occur in the event of a catastrophic loss of said building, and the normal practice ISES observes in such occurrences is to construct modern facilities that meet the campus architectural standards rather than attempt to mimic the historical construction style that has been lost. This is the basic methodology, however, the cost factors and applications of such can be changed readily upon consultation with the Client without impacting project scope or cost. Calculated CRVs are updated automatically in the AMS software when the annual inflation factor is added to the database.

Extensive experience with asset surveys has led ISES to develop a standardized system of data collection that efficiently and effectively utilizes the time spent by our teams in each building. The team will typically start on the roof, or the highest accessible level, and proceed to the lowest level, inspecting each of the discrete building categories as the building is walked. ISES architectural and engineering inspectors will gather information on the condition of the various components and determine what repairs or modifications may be necessary to restore the systems and buildings to an acceptable condition, or to a level defined by the Client.

The visual nature of this inspection process requires close interaction with the Client's operations and maintenance personnel. Many of the problems inherent in building systems are not visually apparent. This necessitates ISES personnel to conduct staff interviews to ensure that all known system problems are cataloged and identified. Working as a team with your personnel improves the accuracy of the database and provides the most useful data possible. Additionally, it is imperative that the Client provide all information possible, including any existing capital budget program information, capital project lists, special studies, and building maintenance

history. ISES may also request assistance from the Client's management and staff to obtain basic information from local contractors or vendors concerning the cost of various repairs and renovations. This will ensure a higher degree of accuracy when estimating the cost of renewal needs.

Upon return from the field, the inspector reviews and orders his (or her) notes. A textual summary document is prepared that highlights major deficiencies in the building. All identified renewal needs are entered into an asset management system database so that costs can be calculated by building, group of buildings, category of deficiency, and numerous other ways. Unlike other organizations, where the data is entered and reports are written by an individual other than the inspector, at ISES Corporation we believe that it is vital that the inspector be accountable for his (or her) own work. There is no better person to write the report than the person who conducted the field inspection. This also allows the QA Specialist to query the inspector directly when inconsistencies arise.

## Recurring and Non-Recurring Facility Renewal Needs

Facility renewal costs are divided into two main categories – recurring and non-recurring. Recurring costs are cyclical and are associated with replacement (or renewal) of building components and systems on a regular cycle. Examples include roofs, chillers, windows, finishes, and air handling units. The tool for projecting the recurring renewal costs is the Lifecycle Component Inventory. Each component has an associated renewal cost, installation date, and life expectancy. From this data, a detailed projection of recurring renewal needs is developed for each building. These needs are categorized by UNIFORMAT II classification codes. The result is a detailed year-by-year projection of recurring renewal needs for a given facility.

Non-recurring costs pertain to facility repairs and improvements that are one-time propositions and are not recurring. They typically consist of facility improvements to accommodate accessibility, address safety deficiencies, or alter a building for a new use. They also include non-recurring deficiencies that could negatively affect the structure of the facility or the systems and components within. For these non-recurring costs, recommendations are developed with estimated costs to rectify said deficiency. These each have a unique identifier and are categorized by system type, priority, and classification, which are defined below. The costs are indexed to local conditions and markups applied as the situation dictates. Examples of such repair work are correction of building façade damage caused by a storm or seismic event or repairs to a roof section. Needs such as these are a significant component of overall need, but they are not recurring needs. Once a building has been rendered compliant with ADA, for example, this cost does not recur.

The renewal needs outlined in the report are noted from a visual inspection and staff interviews. ISES engineering and architectural inspectors develop recommended actions with related costs that are necessary to renew the facility. The developed costs represent the correction of existing deficiencies and anticipated lifecycle failures within a ten-year period to bring the facility to modern standards without any anticipation of change to facility space layout or function. The total costs include variable project delivery costs as determined by the Owner.

## Recurring Renewal Need Classifications

- **Deferred Renewal**  
Recurring repairs, generated by the Lifecycle Component Inventory, that are past due for completion but have not yet been accomplished as part of normal maintenance or capital repair efforts. Further deferral of such renewal could impair the proper functioning of the facility. Costs estimated for Deferred Renewal needs should include compliance with applicable codes, even if such compliance requires expenditures beyond those essential to effect the needed repairs. These do not pertain to components found in what is considered to be program-use space within a building.
- **Recurring Component Replacement**  
Recurring renewal efforts, generated by the Lifecycle Component Inventory, that will be due within the scope of the assessment. These represent regular or normal facility maintenance, repair, or renovation that should be planned in the near future. These efforts do not pertain to components found in what is considered to be program-use space within a building.

## Non-Recurring Renewal Need Classifications

- **Plant/Program Adaption**  
Non-recurring expenditures, stored in the Projects module, required to adapt the physical plant to the evolving needs of the institution and to changing codes or standards. These are expenditures beyond normal maintenance. Examples include compliance with changing codes (e.g., accessibility), facility alterations required by changed teaching or research methods, and improvements occasioned by the adoption of modern technology (e.g., the use of personal computer networks).
- **Corrective Action**  
Non-recurring expenditures, stored in the Projects module, for repairs needed to correct random and unpredictable deficiencies. Such recommendations are not related to aligning a building with codes or standards. Deficiencies classified as Corrective Action could have an effect on building aesthetics, safety, or usability.

## Non-Recurring Renewal Need Categorization

Renewal needs are divided into appropriate categories, as well as multiple systems, components, and elements within each category. Common categories include:

- Substructure
- Core and Shell
- Interiors
- Building Equipment and Systems
- Other Building Construction
- Building Site Improvements
- Safety and Security
- Access Control
- Hazardous Materials

The Client has the ability to edit support tables to allow for client-specified categories to be added to the above lists.

## Code Compliance Limitations

The FCA conducted by ISES Corporation is an inspection of an existing facility intended to identify building system upgrades which could increase the projected lifespan of the building or decrease the operating cost for the building or a combination of the two. ISES Corporation is not functioning as a design architect, a design

engineer, or as a building code official. ISES, in conducting the FCA, is not making an all-inclusive code compliance inspection. If building code violations are observed, they will be reported to the Owner, but any list of code violations is not exhaustive. If code violations exist, their correction is the responsibility of the professional who designed them, or the party who constructed them, or the Owner's representative who approved them. If major remodeling of existing spaces or additions to existing spaces are contemplated, ISES Corporation's recommendations are contingent upon a registered design professional's certification that the modifications can be made in compliance with all applicable codes existing at the time of such remodeling or addition.

### Prioritization of Non-Recurring Renewal Needs

Recurring renewal needs do not receive individual prioritization, as the entire data set of needs in this category is year-based. Each separate component has a distinct need year, rendering further prioritization unnecessary. Each non-recurring renewal need, however, has a priority assigned to indicate the criticality of the recommended work. The prioritization utilized for this subset of the data is as follows.

- **Priority 1 – Immediate**

Items in this category require immediate action to:

- a. correct a cited safety hazard
- b. stop accelerated deterioration
- c. and/or return a facility to normal operation

- **Priority 2 – Critical**

Items in this category include actions that must be addressed in the short-term:

- a. repairs to prevent further deterioration
- b. improvements to facilities associated with critical accessibility needs
- c. potential safety hazards

- **Priority 3 – Non-Critical**

Items in this category include:

- a. improvements to facilities associated with non-critical accessibility needs
- b. actions to bring a facility into compliance with current building codes as grandfather clauses expire
- c. actions to improve the usability of a facility following an occupancy or use change

### Sustainability Analysis

Sustainability recommendations are focused on opportunities to conserve resource consumption. A recommendation can either reduce existing consumption or reduce rate of growth in consumption. Examples include recommendations that will improve the efficiency of an HVAC system (e.g., controls systems upgrades) or directly reduce consumption of a resource (e.g., waterless urinals). Where items fall within this category, an estimate of annual savings (or cost avoidance) will be provided. Each building report will contain a separate Sustainability Analysis summary that translates cost avoidance measures into return on investment.

### Ranking of Needs

Within the FCA database, renewal needs are prioritized as described above. While the database quickly details the highest priority needs within a given structure, the question that arises is: What need (or group of needs) has the highest priority overall? ISES provides a ranking protocol that prioritizes the recommendations system-wide. Needs are evaluated and ranked objectively. The database allows you to define the ranking criteria.

The ranking report takes into account the individual priority of need within a building (a life safety recommendation, for example, would rank higher than a recommendation to modernize the lighting), but also marries that prioritization to the importance of a given structure relative to the mission of the client (a fire station is mission-critical to a city, for example, whereas a maintenance building is not). It further takes into account the impact of the facility as a whole. This ranking system provides a methodology for narrowing a database of several hundred, or even thousand, separate line items into a defensible list of priority recommendations. Each building will have a priority rating calculation. This calculation will not be unique for each facility and some duplication will be possible, but it will greatly aid the process of filtering priority needs. The building priority rating will be calculated as the product of three individual ratings, each multiplied by the other, for an overall building priority rating. The proposed ratings are shown below.

RATING FACTOR	SCORE	DEFINITION	EXAMPLE FACILITIES
<b>Core Mission Rating</b>  How important is this facility in terms of accomplishing the core mission of the campus, which is higher education of students.	1	The sole function of this facility is to provide educational space serving the needs of the student body	Engineering classroom, library
	2	This is not an educational facility, but provides key support for the student population	Residence hall, dining facility
	3	This facility is completely unrelated to the academic mission of the campus	PE center, power plant
<b>Landmark Rating</b>  How important is the facility historically and visually on campus.	0.9	This facility is a key campus icon, and is also a significant historic structure	
	1.0	This facility is a key campus icon, but is not a historic structure	
	1.1	This facility has no iconic / historic significance	
<b>Campus Impact Rating</b>  What level of impact does this facility have on the client's operation as a whole	1	The function of this facility on a daily basis has an impact on the entire campus population. Loss of use of this facility is not an acceptable alternative.	Power plant, library, information technology center
	2	The function of this facility on a daily basis has an impact of at least half of the campus population. Loss of use of this facility must be minimized.	Dining hall, student center, student recreation center
	3	The function of this facility on an irregular basis has an impact on at least half of the campus population. This facility can be taken out of service with advance planning.	Stadium, administration building
	4	The function of this facility on a daily basis has minimal impact on the campus population. This facility can be replaced without significant adverse impacts on campus operations.	Physical Plant, compound, storage warehouse
	5	The function of this facility on a daily basis has no impact on the campus population beyond the immediate building occupants. This facility can easily be replaced.	Small classroom building, fine arts studio

Each of the three rating factors above will be loaded into the database using custom fields at the building asset level. Once these factors are loaded, a report will be generated from the database that will list the needs from the entire database in ranking order, from lowest ranking score to highest. The lowest score achieved will be the highest priority need.

The ranking report will be able to be run for the entire database, for any group of buildings within the database, or across all needs in the database for a given system code. The anticipated output for this ranking report will include the following information:

- Building (Asset) Name
- Ranking Score
- Cost
- Building (Asset) Number
- Need Description

As with all standard reports in the ISES AMS database, the output of this report can be sent to a PDF file or exported to MS Excel for further sorting and manipulation.

## Deliverables

As instructed by the Client's request in the RFP, ISES will develop a single report through three submissions, corresponding to 50 percent, 75 percent, and 100 percent completion. The report will include an overall summary, methodology description, various summary reports, recommendations for correction, photolog entries, and CAD (if provided by Client) showing the location of non-recurring needs. The summary will provide consolidated reporting data across the entire asset portfolio. Costs will be totaled by building, system code, and priority. Various other system and custom reports will also be presented. The overall condition of the facility portfolio will be categorized, and comparisons between your portfolio and analogous institutions will be developed. All data relative to the FCA report will be developed in, and contained within, the ISES AMS (Asset Management System) web-enabled database. ISES will host this database system on our servers, and City of Fort Lauderdale personnel will have access to the system via the Internet.

## Why Choose ISES

ISES Corporation was founded to provide Facility Condition Assessment studies. It remains our core business and our primary service. ISES is the only small business enterprise in the nation that has continuously provided FCA services for more than 26 years. Additionally, we have been certified as a Small Disadvantaged Business (SDB) in the Federal Government's SDB program. Despite our status as a small business, we routinely inspect an average of more than 2,000 buildings encompassing an average of 40 million GSF annually. To date, ISES has surveyed over 1 billion square feet of facilities and many billions of linear feet of infrastructure. Our corporate experience in this field is unrivaled.

Our guiding principles, as laid down by the company founder, are to provide quality professional services at a fair and reasonable cost. We constantly reexamine our internal processes and procedures to improve customer support. We seek to augment the capabilities of our client facility management organizations, not supplant them. Through this process, we establish long-term partnership arrangements that work to the benefit of all parties involved.

The professional staff that ISES utilizes to conduct FCA projects is composed entirely of ISES in-house staff. Our personnel not only have substantial experience providing such services, but also maintain certifications in critical areas, such as LEED and energy management (CEM). We take pride in our ability to meet our clients' expectations with respect to quality, and we always are able to support our clients' schedule needs. Client satisfaction is reflected in the large amount of repeat work we perform annually (over 60 percent of our annual purchase orders come in the form of repeat work from existing clients). This level of repeat work would not be

sustained if we failed to meet our clients' expectations with respect to quality and timeliness. A listing of our previous government clients and work scope can be found in Section 11. We encourage you to contact any of our previous clients.

### Quality Assurance

ISES Corporation is dedicated to providing a comprehensive solution to the needs specified by the City of Fort Lauderdale. We guarantee that our finished product will meet the needs of the City and achieve all of the specified goals. To ensure this end, Quality Control and Quality Assurance (QC/QA) are an integral part of the project team organization.

The primary goal of the QC/QA program is to ensure that all data entered into the ISES AMS database meets the requirements of the project RFP. All data developed or updated in the assessment software will be subject to the QC/QA review process described below. This type of review of data is standard procedure for all FCA report delivery by ISES. We have developed a broad range of key indicators over the years that allow for rapid identification and correction of data entry errors.

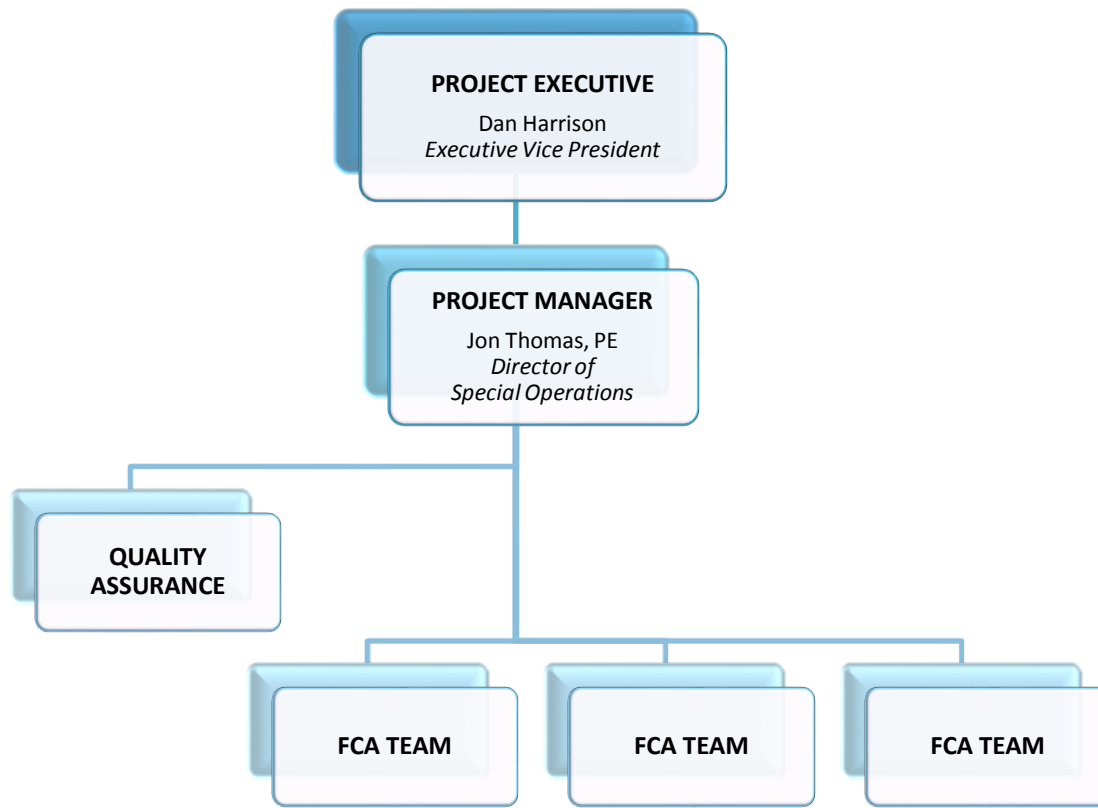
Our review of the data is enabled by our experience in development of condition assessment reports for thousands of facility assets. While each individual building is unique, facility condition trends tend to replicate themselves over time and across assets. Data which deviates significantly from established norms is readily identifiable by our experienced staff, and errors are caught before they are submitted to the client. Throughout our corporate history, quality, not quantity of results, has been our aim and guiding principle. The number one goal of ISES Corporation is to deliver a valuable product that satisfies the Client.

### ESTIMATED TIMETABLE

Project duration, from start to completion, is expected to take no longer than nine calendar months. This estimate reflects the timetable described in Section 03 – Reports of the RFP.



## PROJECT TEAM



- **Project Executive:** Senior ISES executive with overall responsibility for client satisfaction
- **Project Manager:** Primary client contact who manages and coordinates ISES' client work on a day-to-day basis
- **FCA Teams:** Comprised of architectural and engineering assessors, these teams perform the asset inspections, interview client staff, create and input data into AMS, and draft asset reports
- **Quality Assurance:** ISES team of technical editors who review, fact-check, and produce final asset reports
- **Software Training/Support:** IT personnel who train client staff and provide ongoing software support
- **CAD Services:** Produce drawings with icon locations on CAD drawings provided by client

**DANIEL C. HARRISON**  
**Executive Vice President**

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Years of Experience  
30

Education  
B.S. in Civil Engineering  
*University of Alabama*

Professional Affiliations  
APPA  
NACUBO  
NASFA

Publications  
▪ *Facilities Manager*  
▪ *CASH Register*  
▪ *Facility Manager's  
Maintenance Handbook*

Work Experience

Mr. Harrison has over 30 years of dynamic experience in the facilities management and engineering fields. He has held key leadership positions in several large plant maintenance organizations and is well-versed in all aspects of facilities management, including maintenance and utility operations, facilities planning, outsourcing, service contract management, construction management, preventive maintenance planning, and work control.

Starting with ISES Corporation in early 1992, he quickly progressed through the ranks of FCA inspection personnel, moving on to first manage key projects, then conduct numerous special studies (benchmarking, staffing, organization review, among others), eventually becoming Executive Vice President of the corporation. In this role, he routinely provides presentations and lectures to various organizations nationwide on the capabilities of ISES Corporation as well as facility condition assessment trends and methodologies. He has presented results of findings to numerous legislative committees and Boards of Trustees. He is also responsible for all corporate production operations and development of new service offerings.

Prior to joining ISES Corporation, Mr. Harrison was a member of the United States Navy's Civil Engineer Corps. Serving for nine years, he gained invaluable experience in the art and science of facilities management and operations.

Summary of Relevant Qualifications

*Facility Condition Assessment (University of Michigan):* Project management and coordination responsibilities for a multi-year, multiple phase FCA project encompassing 20 million GSF (to date) and more than 500 facilities.

*State of Nevada Planning Commission for the New Construction, Design, Maintenance, and Repair of School Facilities:* Developed a statewide reporting system, complete with a central database for cataloging facility deficiencies for all 17 school districts throughout the state. This project covered more than 400 schools with 27 million GSF.

*Facility Condition Assessment (City of Chicago):* Project Executive/Manager for a citywide facility condition assessment project. The FCA project includes identification of more than 500 structures, with physical inspection and reporting for 312 structures with over 6 million GSF.

*Naval Education and Training Center, Newport, Rhode Island:* Production Officer, which included responsibility for overall leadership and daily direction of the Production Department. This department (which included the Maintenance, Utility, and Transportation Shops, along with work control and service contract management divisions) had over 350 employees and an annual \$18 million operating budget. This position also included responsibility for maintaining structures registered on the National Register of Historic Places.

**JONATHAN (JON) C. THOMAS, PE, CEM, LEED® AP O+M**  
**Director of Special Operations**

---

Years of Experience

16

Education

B.S. in Industrial  
Engineering  
*Georgia Institute of  
Technology*

Licenses/Registrations

Professional Engineer  
GA PE032746  
CA I4359

Certifications

Certified Energy Manager  
14013

LEED® Accredited  
Professional Operations +  
Maintenance 10378060

Work Experience

Jon Thomas joined ISES Corporation in 1998. He first worked in the areas of quality assurance and CAD support. In 2001, he began managing Equipment Inventory and Life Cycle Modeling services and was deployed on Facility Condition Assessment (FCA) efforts. Today, he manages select FCA projects and leads ISES Computerized Maintenance Management Software (CMMS) consulting and Operations and Maintenance Programming (OMP) services.

Mr. Thomas' expertise lies in building systems, including HVAC, electrical, plumbing, fire detection, notification, suppression, and vertical transportation. He has analyzed and provided guidance on the management of these systems at the building level, as well as the utilities generation and transmission scale. Mr. Thomas also develops maintenance programs for these and other systems that include routine, preventive, and predictive activities.

Summary of Relevant Qualifications

*Operations and Maintenance Programming (University of Michigan):* The University of Michigan employed ISES to generate O&M estimates and programs for 15 state-of-the-art facilities. Mr. Thomas' involvement escalated from producing the base elements to overall project management. This OMP effort is ongoing, as the U of M has retained ISES to develop O&M programming for 1.3 million additional square feet of space. The spaces analyzed include the Michigan Stadium, solid state electronics laboratories (clean rooms), high-tech research and teaching laboratories, hospital and clinic, and other spaces ranging in complexity.

*Facility Condition Assessment, Equipment Inventory, Maintenance Program Development, CMMS Mobilization (Portland Community College):* Oversaw FCA and performed engineering analysis of PCC campus facility portfolio at three campuses and several satellite facilities enclosing over 2 million square feet. Managed equipment inventory and maintenance program development effort. Oversaw the loading of equipment and maintenance program data into CMMS during application implementation.

*Equipment Inventory, Facility Condition Assessment, Operations and Maintenance Programming, and CMMS Implementation (Harvard Real Estate Services, Dumbarton Oaks Research Library and Collection):* ISES was employed by Harvard Real Estate Services to analyze Dumbarton Oaks Research Library and Collection. Mr. Thomas managed an effort that included the application of ISES equipment inventory, FCA, and OMP services. Harvard decided to extend the involvement of ISES in its maintenance management efforts, which included the implementation of a CMMS application. ISES effectively supported Harvard in the selection and implementation of its new CMMS.

# *State of Florida*

## *Department of State*

I certify from the records of this office that ISES CORPORATION is a Georgia corporation authorized to transact business in the State of Florida, qualified on March 23, 2000.

The document number of this corporation is F00000001611.

I further certify that said corporation has paid all fees due this office through December 31, 2013, that its most recent annual report/uniform business report was filed on April 2, 2013, and its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Second day of October, 2013*



*Ken DeFina*  
*Secretary of State*

Authentication ID: CU8229483120

To authenticate this certificate, visit the following site, enter this ID, and then follow the instructions displayed.

<https://efile.sunbiz.org/certauthver.html>



# CERTIFICATE OF LIABILITY INSURANCE

ISESC-1

OP ID: LS

DATE (MM/DD/YYYY)

07/15/2013

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> <b>Cobbs Allen</b> 115 Office Park Drive, Ste 200 Birmingham, AL 35223 April Shaling	<b>Phone: 205-414-8100</b>	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): E-MAIL ADDRESS:	<b>FAX (A/C, No):</b>																				
	<b>Fax:</b>	<table border="1"> <tr> <th colspan="2">INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> <tr> <td>INSURER A :</td> <td><b>Great American Ins. Co.</b></td> <td><b>16691</b></td> </tr> <tr> <td>INSURER B :</td> <td><b>Hartford Casualty Ins. Co.</b></td> <td><b>29424</b></td> </tr> <tr> <td>INSURER C :</td> <td><b>Travelers Casualty Insurance</b></td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> <td></td> </tr> </table>		INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A :	<b>Great American Ins. Co.</b>	<b>16691</b>	INSURER B :	<b>Hartford Casualty Ins. Co.</b>	<b>29424</b>	INSURER C :	<b>Travelers Casualty Insurance</b>		INSURER D :			INSURER E :			INSURER F :	
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<b>INSURED</b> <b>ISES Corporation</b> 2165 West Park Ct. Ste N Stone Mountain, GA 30087																							

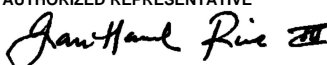
**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<b>GENERAL LIABILITY</b> <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC			SPP2128404	11/01/2012	11/01/2013	EACH OCCURRENCE \$ <b>1,000,000</b> DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>1,000,000</b> MED EXP (Any one person) \$ <b>10,000</b> PERSONAL & ADV INJURY \$ <b>1,000,000</b> GENERAL AGGREGATE \$ <b>2,000,000</b> PRODUCTS - COMP/OP AGG \$ <b>2,000,000</b> <b>Emp Ben.</b> \$ <b>1,000,000</b>
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			SPP2128404	11/01/2012	11/01/2013	COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b> BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ <b>0</b>			SPP2128404	11/01/2012	11/01/2013	EACH OCCURRENCE \$ <b>5,000,000</b> AGGREGATE \$ <b>5,000,000</b> \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	21WECRW7682	11/01/2012	11/01/2013	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ <b>1,000,000</b> E.L. DISEASE - EA EMPLOYEE \$ <b>1,000,000</b> E.L. DISEASE - POLICY LIMIT \$ <b>1,000,000</b>
C	<b>Prof Liab Occurrence</b>			105925265	05/01/2013	05/01/2014	<b>Occurrence</b> <b>2,000,000</b> <b>Aggregate</b> <b>2,000,000</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**

<b>INFOPOR</b>  <b>Information Purposes Only</b>	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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## ASSESSMENT OF CITY'S NEEDS

The City of Fort Lauderdale, Facilities Division, Parks and Recreation Department is seeking a qualified firm to provide Facility Condition Assessment services for 140 facilities encompassing approximately 1,778,375 gross square feet. This firm should have vast experience providing these types of services to government entities and be capable of completing the scope of work in the required timeframe. To be eligible for award of the contract, it is also required that the firm be legally licensed to perform such work and have no conflict of interest with any other work being performed for the City.

The selected assets will each receive a visual and non-destructive evaluation of the facility, grounds, components, and building systems. The Contractor will use the data gathered to construct a long-term facilities renewal program for the City's assets. Current and upcoming needs should be identified, and lifecycle information regarding each building and its components should be provided. Each deficiency or recommendation should be prioritized and estimated. This will provide a complete checklist of recommended facility renewal needs to aid with capital improvement planning for the next ten years.

The FCA service should also be accompanied by a comprehensive electronic database of FCA data and information to be used for asset management, maintenance and repair, and capital renewal planning. Data gathered during site visits, interviews with maintenance staff, and any pre-existing documentation will be uploaded into the electronic database. This data will identify current and upcoming repair, alteration, and improvement needs.

A comprehensive report will be delivered in three stages: 50 percent, 75 percent, and 100 percent completion. This will allow the City to monitor the direction of the Contractor's work, as well as its progress. The City will review the report at each stage and comment as necessary. The City's Project Manager will instruct the Contractor on proceeding to the following stage. The Contractor should notify the City if any more in-depth investigation is needed.

The Contractors' quoted fee should be a lump sum, fixed fee that is valid for 120 days from the date of the RFP opening.

## MEETING DEADLINES

ISES has been performing Facility Condition Assessments for more than 26 years. It is the core business the company was founded to provide. To date, ISES has surveyed over 1 billion square feet of facilities and many billions of linear feet of infrastructure. ISES is regularly called upon to perform facility condition assessments ranging in size from one building to entire campuses of large research universities or the facilities of an entire state. Annually, ISES inspects an average of more than 2,000 buildings encompassing an average of 40 million GSF. The projects frequently have aggressive schedules, with little project lead time and short durations for completion.

ISES' specialized methods for conducting facility assessments, combined with the quality and flexibility of the individuals who make up the greatest asset of ISES, allow us to regularly complete a variety of different size projects within the established timeframes. The professional staff that ISES utilizes to conduct FCA projects is composed entirely of ISES in-house staff. Unlike other organizations, where the data is entered and reports are written by an individual other than the inspector, at ISES Corporation we believe that it is vital that the inspector be accountable for his (or her) own work. There is no better person to write the report than the person who conducted the field inspection. While we strive to keep personnel busy at all times, the teams assigned to this project will have no trouble meeting the established deadline. ISES will ensure that adequate resources from our staff of available trained personnel are dedicated to timely completion of this project.

We take pride in our history of meeting our large portfolio of customers' varying needs with respect to both timely product delivery and quality of delivery. Fulfillment of our clients' needs to their satisfaction is reflected in the large amount of repeat work we perform annually (over 60 percent of our annual purchase orders come in the form of repeat work from existing clients). This level of repeat work would not be sustained if we failed to meet our clients' expectations.

## ADDITIONAL SERVICES

ISES Corporation is not recommending any additional services at this time.



**CLIENTS AND REFERENCES**

The following is a list of ISES clients for whom Facility Condition Assessment (and various other engineering and management services) have been performed in the last 5 years.

Client	Reference	Phone	Email	FCA / EI Site Profile	FCA	Infrastructure	ADA Study	Elevator Analysis	Security Analysis	O & M	CAD	O&M Programming	CMMS	Energy Consulting	Equipment Inventory	Work Last Performed
Argonne National Laboratory	Mr. Mark Boehlen Project Manager, Facility Systems	(630) 252-4045	mboehlen@anl.gov	180 buildings, 5.8 million GSF	X	X			X	X			X			2010
Brookhaven National Laboratory	Mr. Michael J. Paquette	(631) 344-5891	mpaquette@bnl.gov	410 buildings, 4.5 million GSF	X	X									X	2008
Chelsea Soldiers' Home	Mr. Robert Maniatis Facility Manager	(617) 887-7170	robert.maniatis@state.ma.us	5 buildings, 450,000 GSF	X										X	2012
City of Chicago, IL - Public Building Commission Forest Preserve District of Cook County	Mr. Arthur Del Muro, AIA, LEED ®AP Senior Design Project Manager-PMO	(312) 744-7924	Art.DelMuro@cityofchicago.org	550 buildings, 6 million GSF city-wide	X					X						2012
City of Irvine, CA	Ms. Deanna Manning Director of Community Services	(949) 724-6680	dmanning@ci.irvine.ca.us	17 buildings, 470,000 GSF plus 42 parks	X	X										2010
City of Spartanburg, SC	Mr. David Cook Construction Project Manager	(864) 596-3741	dcook@cityofspartanburg.org	26 buildings, 1.2 million GSF	X										X	2011
County of Bernalillo, NM	Ms. Mary Murnane, CFM, AICP Interim Director, Fleet and Facilities Management Dept	(505) 848-1500	mmurnane@bernco.gov	41 buildings, 525,733 GSF	X											2013
County of Lancaster, SC	Mr. Bryant J. Cook Lancaster County Procurement Officer	(803) 285-6323	bcook@lancastercountysc.net	3 buildings, 98,590 GSF	X											2013
County of Los Alamos, NM	Mr. John Jarrad Vice President (Huitt-Zollars Inc.)	(505) 883-8114	jjarrad@huitt-zollars.com	21 buildings, 200,474 GSF	X											2010
Department of the Navy	Mr. Carl Rabenaldt Vice President (Parsons Corporation)	(713) 871-7014	carl.rabenaldt@parsons.com	1,200 buildings, 21 million GSF	X											2010
State of Arizona	Ms. Nola Barnes General Manager, General Services Division	(602) 542-1954	nola.barnes@azdoa.gov	41 buildings, 3.6 million GSF	X											2008
State of New Mexico	Ms. Martha Perrins Dallman Project Manager	(505) 670-7391	martha.perrins-dall@state.nm.us	138 buildings, 3.7 million GSF	X											2009
State of Utah	Mr. Bruce Whittington Program Director	(801) 538-3547	bwhittington@utah.gov	2,450 buildings, 31 million GSF	X	X					X					2008
Town of Guilford, CT	Mr. Clifford Gurnham Director of Operations, Guilford Board Of Education	(203) 458-0002 x12	GurnhamC@guilford.k12.ct.us	7 buildings (some with modulars), 431,000 GSF	X											2013
Village of Downers Grove	Mr. Michael Baker Deputy Village Manager	(630) 434-6877	mbaker@downers.us	6 buildings, 250,000 GSF	X											2012

## ASSET MANAGEMENT SYSTEM DATABASE

Our continued professional growth has allowed us to first develop, and then continue to improve, a comprehensive database management system for developing and managing facility assessment data. The current version, ISES AMS, is a web-enabled system, hosted in a secure Tier 1 Data Center. The various individual client databases hosted by ISES contain facility information for more than 9,000 facility assets, encompassing more than 450 million GSF, with a plant value in excess of \$125 billion.

### AMS Demonstration

A complete working demonstration of the AMS (Asset Management System) can be viewed by visiting ISES on the Internet via the ISES homepage (<http://www.isescorp.com>). Click on the green Request Demo button in the upper right-hand corner to register for login information. You may also use the ISES URL address <https://ams2011.isescorp.com> to obtain access. You will need the following information:

- Name: demo
- Password: demodemo1
- Select "AMS Precise"

Because the Asset Management System is web-enabled and hosted in an ASP environment, there are no minimal hardware specifications. It is compatible with Windows Internet Explorer 7.0 or higher, as well as comparable browser systems, such as Firefox and Google Chrome.

### Recommended Renewal Needs, by Asset

AMS is a powerful and invaluable tool. From ease of use for data entry to providing reports and graphics utilized to quantify and qualify capital improvement plans, ISES Corporation's asset management system is sure to exceed your expectations. It is web-based and user-friendly with a menu-driven system created on the Microsoft™ Silverlight platform for the efficient management and organization of Facility Condition Assessment information. It uses a relational database, eliminating the storage of redundant data.

The database is a mature, ninth-generation system, hosted under an ASP model. The asset management system will be accessible via the Internet to anyone designated by the Client as an authorized user. ISES will provide access to AMS via our own web servers and will ensure that the system remains available and current. The only requirements for your authorized users are Internet access and Microsoft™ Internet Explorer web browser software.

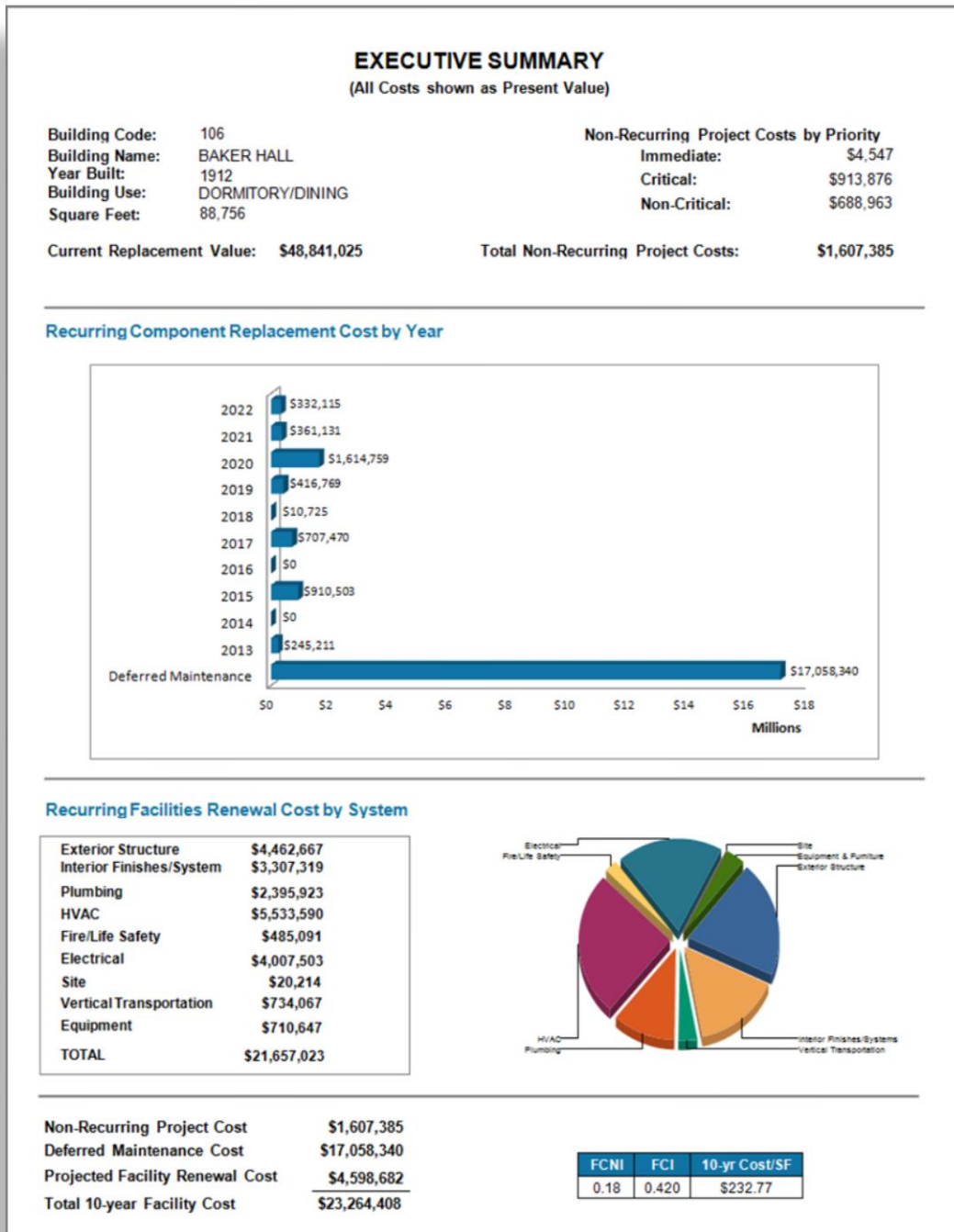
Although each user of this system in the hosted environment must be a named user, the proposed hosting agreement is not predicated upon the number of named users, but rather on the number of concurrent users. The ISES hosting fee includes unlimited customer support via a toll-free telephone help line and email. This customer support also includes custom report development as requested by the Client.

AMS is the industry standard for maintaining and managing capital renewal and deferred renewal databases. The system accommodates ongoing management and utilization of FCA information in an efficient manner, allowing facilities professionals to manage their portfolios – instead of being managed by deteriorating facilities conditions.

## Executive Summary

Figure 1 is an illustration of a standard Executive Summary report for a building upon completion of the facility assessment. This concise summary provides an invaluable snapshot of the financial needs associated with a given facility over the next ten years. It details recurring renewal needs by year, with deferred renewal totaled separately, and also identifies the non-recurring one-time costs associated with necessary building upgrades for code and accessibility issues.

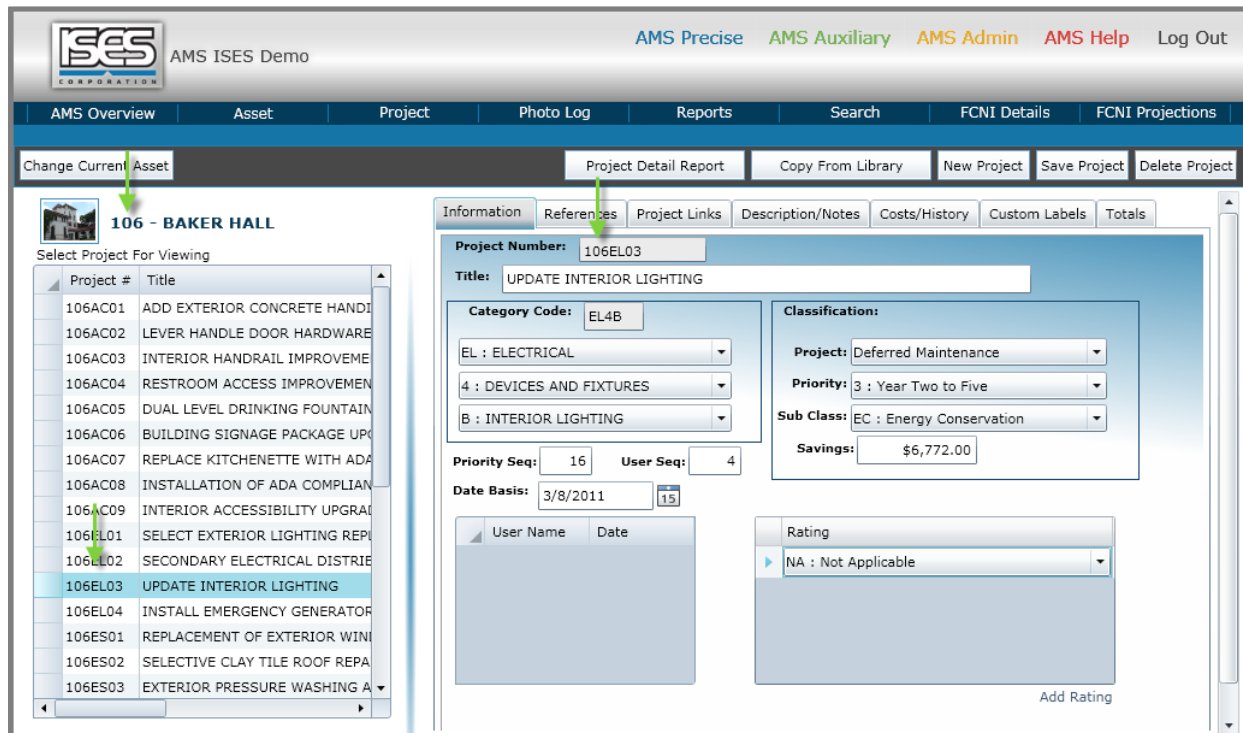
Figure 1:  
Executive Summary for Facility 106, Baker Hall



The user can select an asset for specific data entry; enter, edit, or view various system data and settings, including photographs and CAD; print or view a wide array of reports produced by SAP™ Crystal Reports; generate on-the-fly search lists; and construct forecasting models of system financial data. Each deficiency is classified by the major property components identified for survey in the field. The Client will have the ability to edit fields and support tables to allow for client-specified classifications to be added to the above lists.

Figure 2 depicts fictional Facility 106, Baker Hall. The menu at the left lists the recommendations by ISES field inspectors to restore the facility to like-new condition, or to the standard agreed upon at the outset of the assignment. Project 106EL03 recommends updating the interior lighting in the building.

Figure 2:  
Project Menu, Information tab for Project EL03  
Facility 106, Baker Hall



In addition to detailed renewal information, ISES creates a full photographic record of the physical inspection of the building, which is maintained in the database. Figure 3 depicts thumbnails of the photographs taken by the field inspectors, together with their description and location. Clicking on the photo will generate a larger popup of the image. In Figure 3a, these particular photos are linked to project EL03 (upgrade interior lighting), showing affected areas in the building.

Figure 3:  
Photolog for Facility 106, Baker Hall

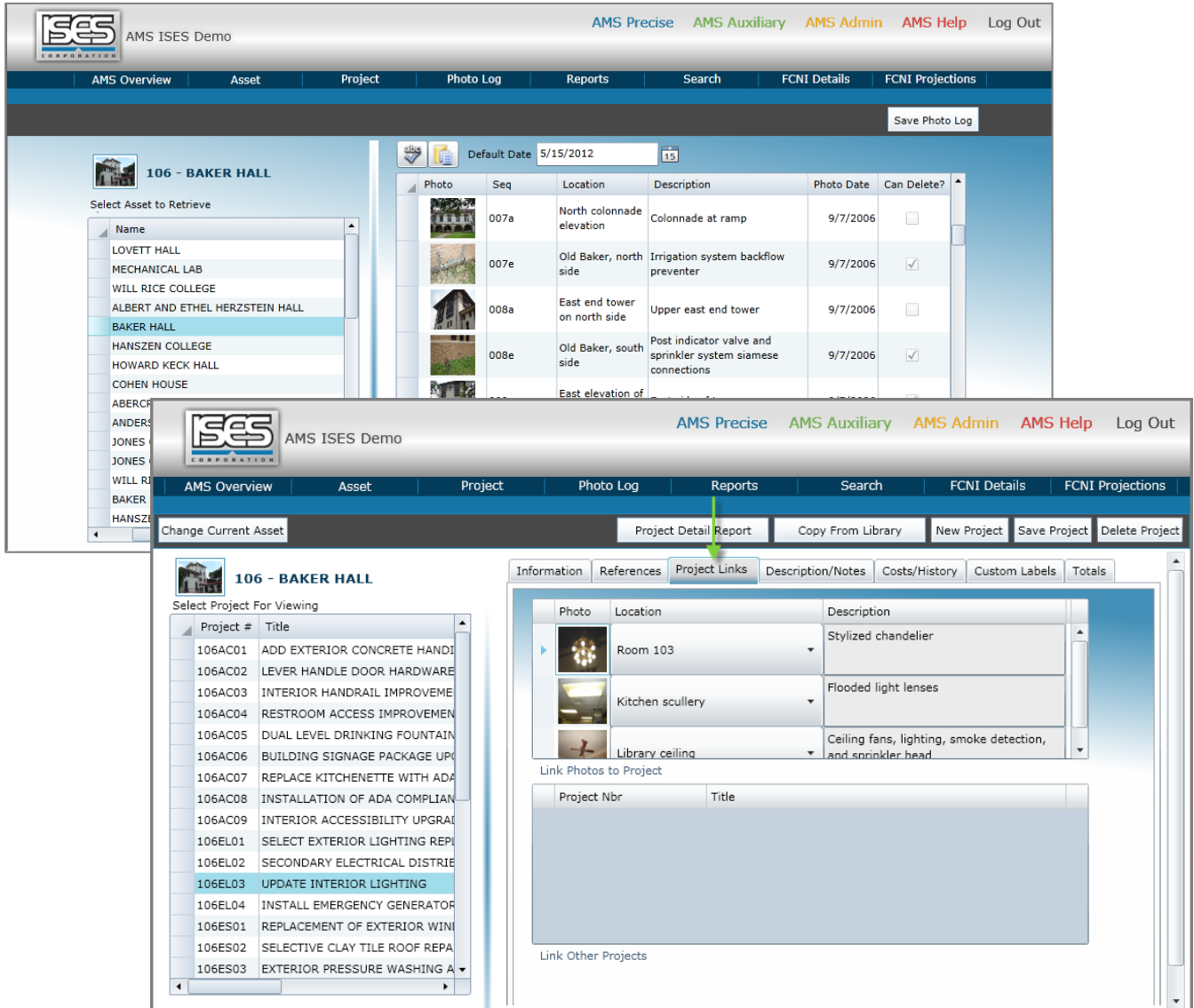
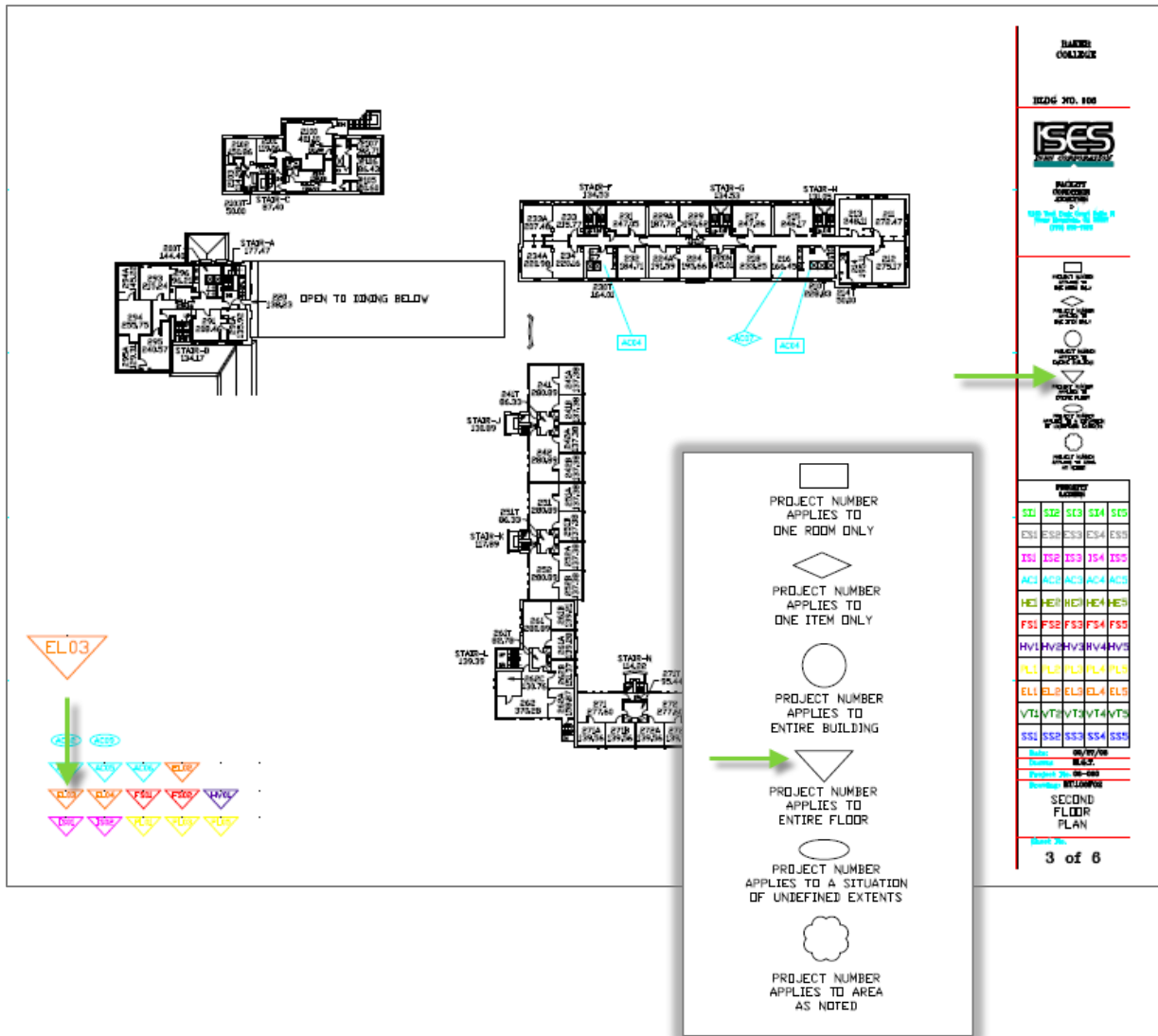


Figure 3a:  
Project Links tab

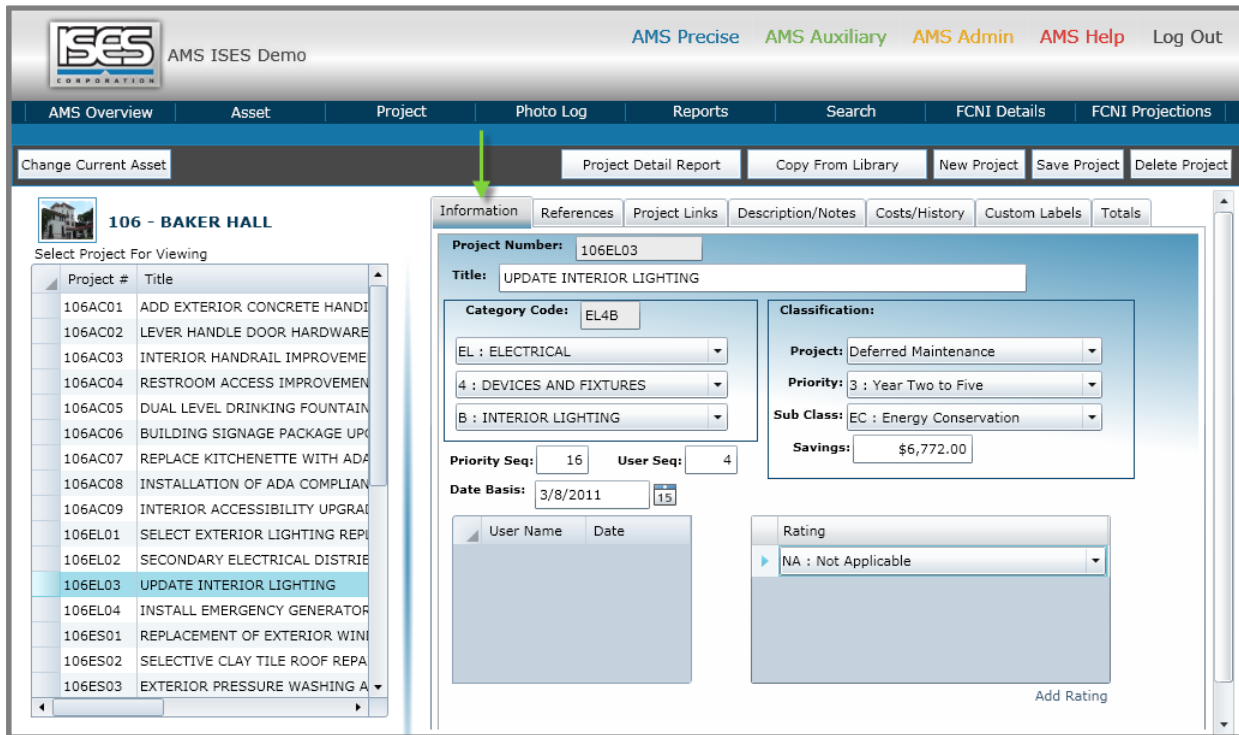
As part of the FCA, ISES provides drawings that show the location of non-recurring renewal recommendations. These drawings are integrated with the database as well as included in published facility reports. Figure 4 depicts the CAD of one floor of the facility. The EL03 icon is located on the second floor. The triangular icon for EL03 indicates that the renewal recommendation pertains to the entire floor.

Figure 4:  
Second floor CAD for Facility 106, Baker Hall



ISES AMS software houses detailed information, as shown in Figure 5, including project title, prioritization, and classification information. All of the fields shown in the sample screenshot are based on standard terms, but are customizable by the end-user client.

Figure 5:  
Information tab showing recommended project to “Replace the Secondary Electrical”  
Facility 106, Baker Hall



ISES inspectors provide cost estimates, which are maintained in AMS. They include multiple tasks, as dictated by circumstances. All costs are estimated and then indexed to local conditions, and markups are applied as the situation dictates. See Figure 6.

Figure 6:  
Costs/History tab  
Facility 106, Baker Hall

The screenshot displays the ISES AMS interface for Facility 106 - Baker Hall. The 'Costs/History' tab is active, showing a table of tasks with columns for Task Description, Unit, Quantity, Material, Labor, and Total. Below the table, there are sections for 'Add Project Cost' and 'Add Project History'.

Task Description	Unit	Quantity	Material	Labor	Total
High efficiency fluorescent fixtures, occupancy sensors, and demolition of existing lighting	SF	54,647	\$1.67	\$2.06	\$203,833.3:
Hurricane impact contingency of 25 percent	LOT	1	\$22,815.00	\$28,143.00	\$50,958.00

Summary Costs:

<b>Material Cost</b>	<b>\$114,075.49</b>	<b>Labor Cost</b>	<b>\$140,715.82</b>
<b>Material Index Cost</b>	<b>\$113,619.19</b>	<b>Labor Index Cost</b>	<b>\$102,722.55</b>

History Table:

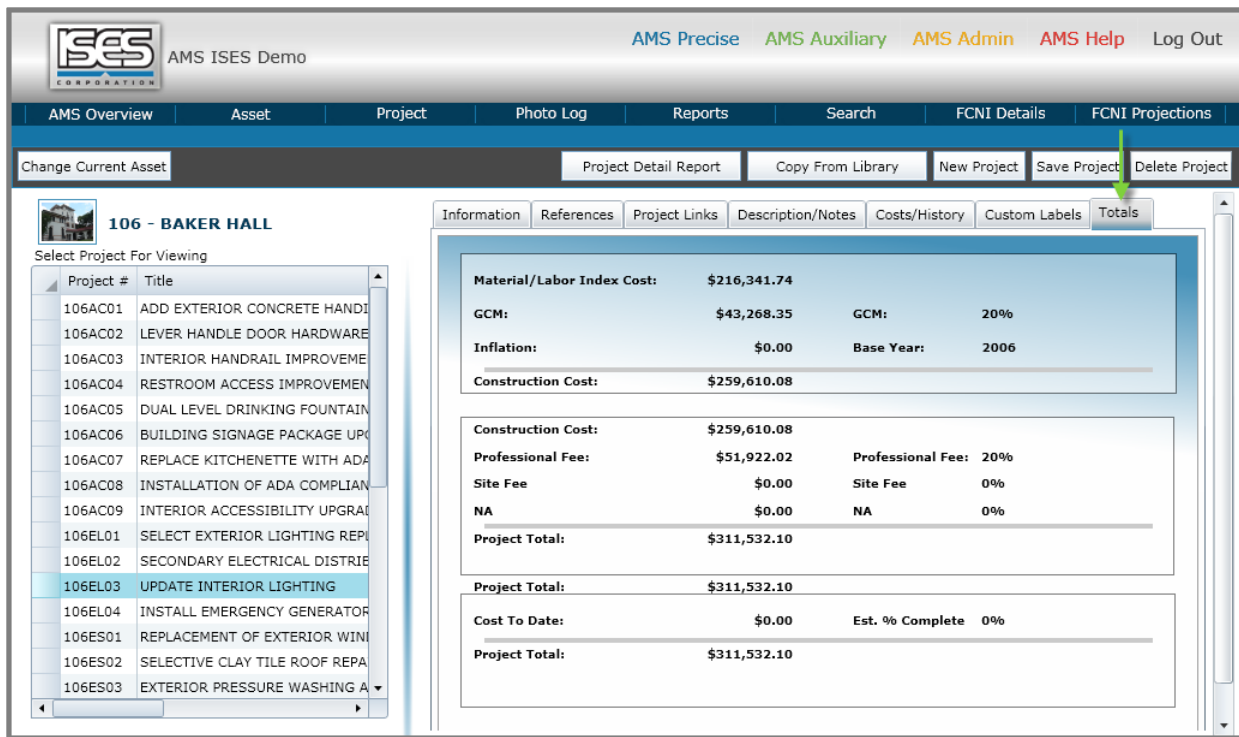
Backlog Date	Cost	Description	Work Order	Est % Complete

The database contains a History section that allows you to record any work that is performed on a project. This feature records the date, actual cost, description of work performed, work order number (if applicable), and estimated percentage complete. If the work is 100% complete, it will remain in the database, but is removed from the reporting of outstanding projects.



Note in Figure 7 that the summary shows original costs, inflation as dictated by the base year of the estimate, total markups, and work completed to date.

Figure 7:  
Totals tab  
Facility 106, Baker Hall



The level of detail shown in Figures 2 through 7 is typical of the results of a comprehensive facility condition assessment inspection program as conducted by ISES. This detailed information constitutes the basic building blocks for the decision process in the field of asset management. Information can also be summarized in tabular format, as shown in Figure 8.

Figure 8:  
Summary for Facility 106, Baker Hall

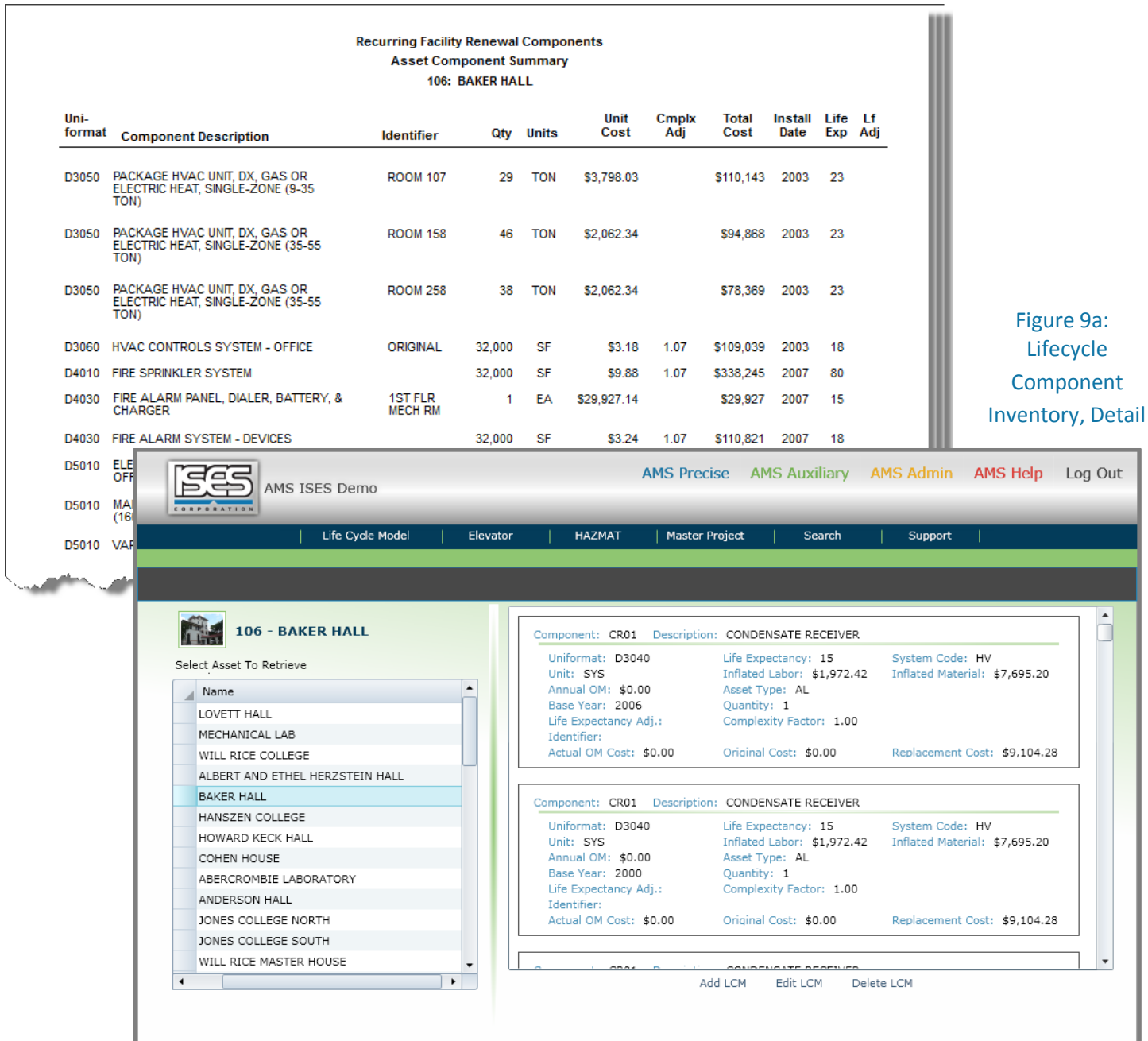
Detailed Project Summary  
Facility Condition Analysis  
Priority Class - Priority Sequence  
106 : BAKER HALL

Cat Code	Project Number	Pri Cls	Pri Seq	Project Title	Construction Cost	Professional Fee	Total Cost
IS5A	106IS04	1	1	REPAIRS TO CRACKED AND WORN MARBLE STEPS	27,701	5,540	33,241
Totals for Priority Class 1					27,701	5,540	33,241
FS1A	106FS02	2	2	REPLACE BATTERY EXIT SIGNS WITH CENTRAL POWER UNITS	22,212	4,442	26,654
HV3A	106HV01	2	3	REPLACE HVAC SYSTEMS IN RESIDENTIAL AREAS	1,771,104	354,221	2,125,324
EL3B	106EL02	2	4	SECONDARY ELECTRICAL DISTRIBUTION REPLACEMENT	855,407	171,081	1,026,489
EL5A	106EL04	2	5	INSTALL EMERGENCY GENERATOR AND POWER NETWORK	144,610	28,922	173,532
Totals for Priority Class 2					2,793,332	558,666	3,351,998
FS5C	106FS01	3	6	CORRIDOR DOOR REPLACEMENT	164,497	32,899	197,397
AC2A	106AC01	3	7	ADD EXTERIOR CONCRETE HANDICAPPED RAMP	20,202	4,040	24,242
AC3A	106AC08	3	8	INSTALLATION OF ADA COMPLIANT ELEVATOR	376,000	75,200	451,200
AC4A	106AC09	3	9	INTERIOR ACCESSIBILITY UPGRADES TO RESIDENCE ROOMS	18,314	3,663	21,977
ES4A	106ES02	3	10	SELECTIVE CLAY TILE ROOF REPAIRS	28,466	5,693	34,159

## Lifecycle Component Inventory

ISES Corporation includes, as a part of the standard FCA package, the development of a full lifecycle component inventory of each facility. The inventory is based on industry standard life expectancies applied to an inventory of building systems and major components within a facility. Figure 9 displays a typical lifecycle inventory list. Figure 9a shows the detail associated with one of the line items in the inventory.

Figure 9:  
Lifecycle Component Inventory  
Facility 106, Baker Hall



## Facility Renewal Reduction Planning

Once the baseline condition of each facility has been established through the FCA process, the built-in modeling capability of the ISES AMS allows you to forecast funding requirements to meet target goals of condition. Figures 10 and 11 illustrate the financial modeling system. It shows the various economic parameters that are input into the model once the existing condition has been established. This information can be presented both graphically and textually.

Figure 10:  
Projection Model  
Facility 106, Baker Hall

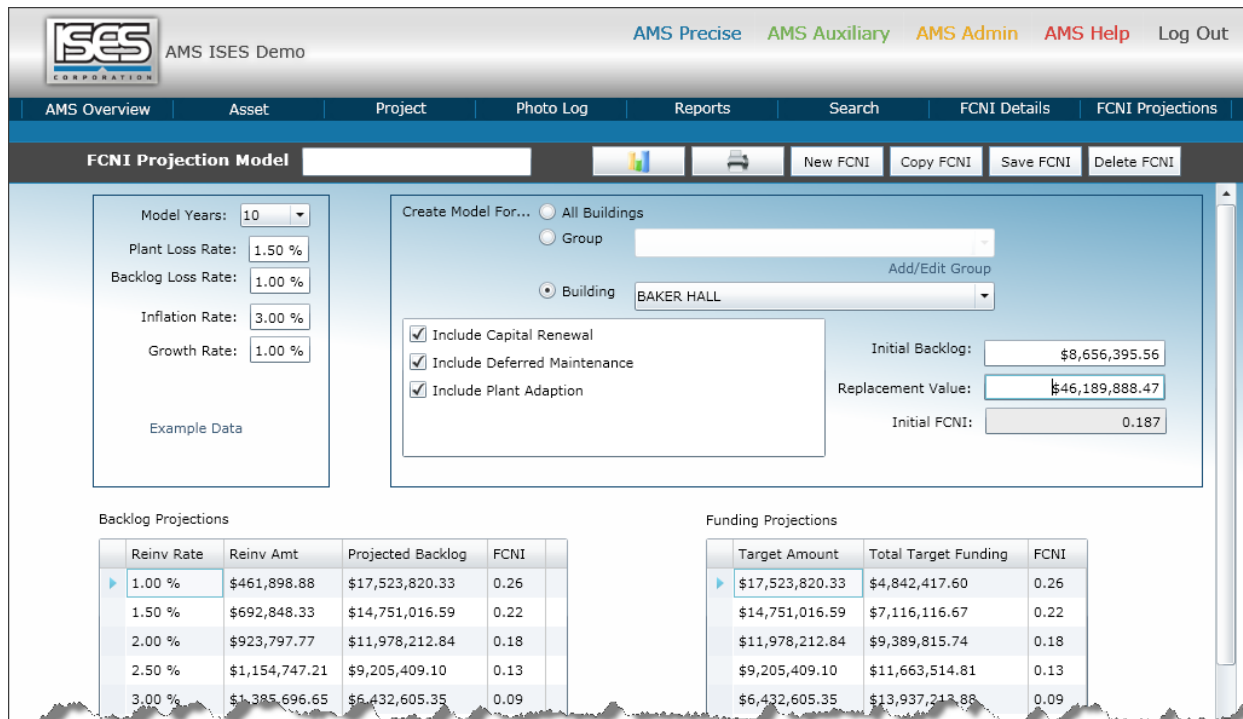
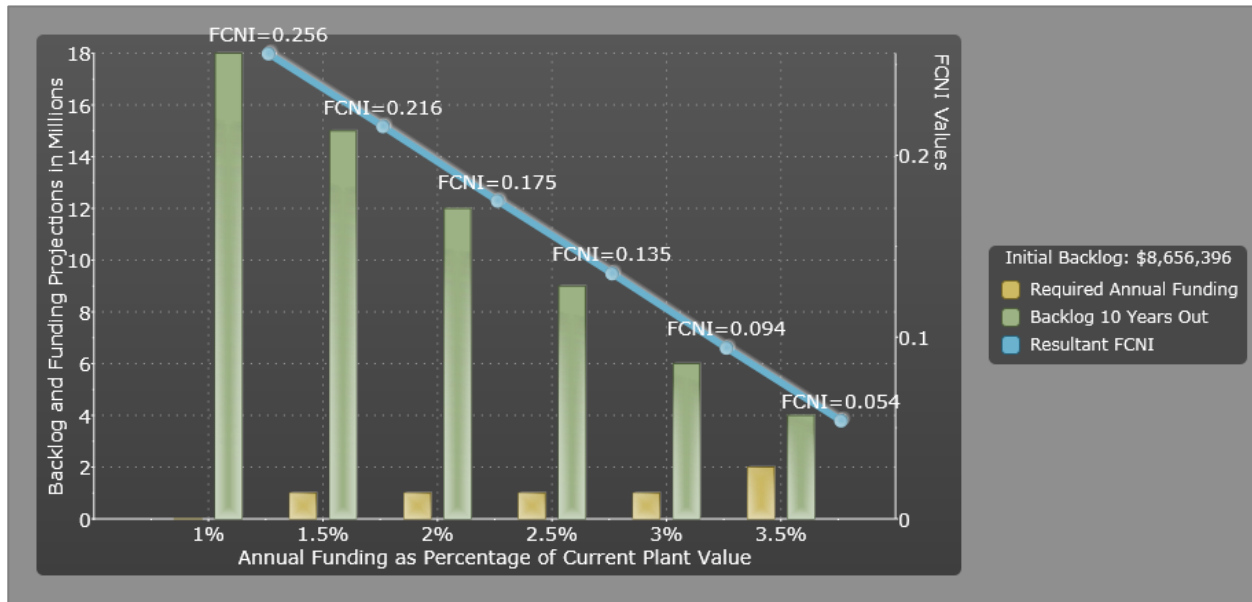


Figure 11:  
Projection Model, Graphic Report  
Facility 106, Baker Hall

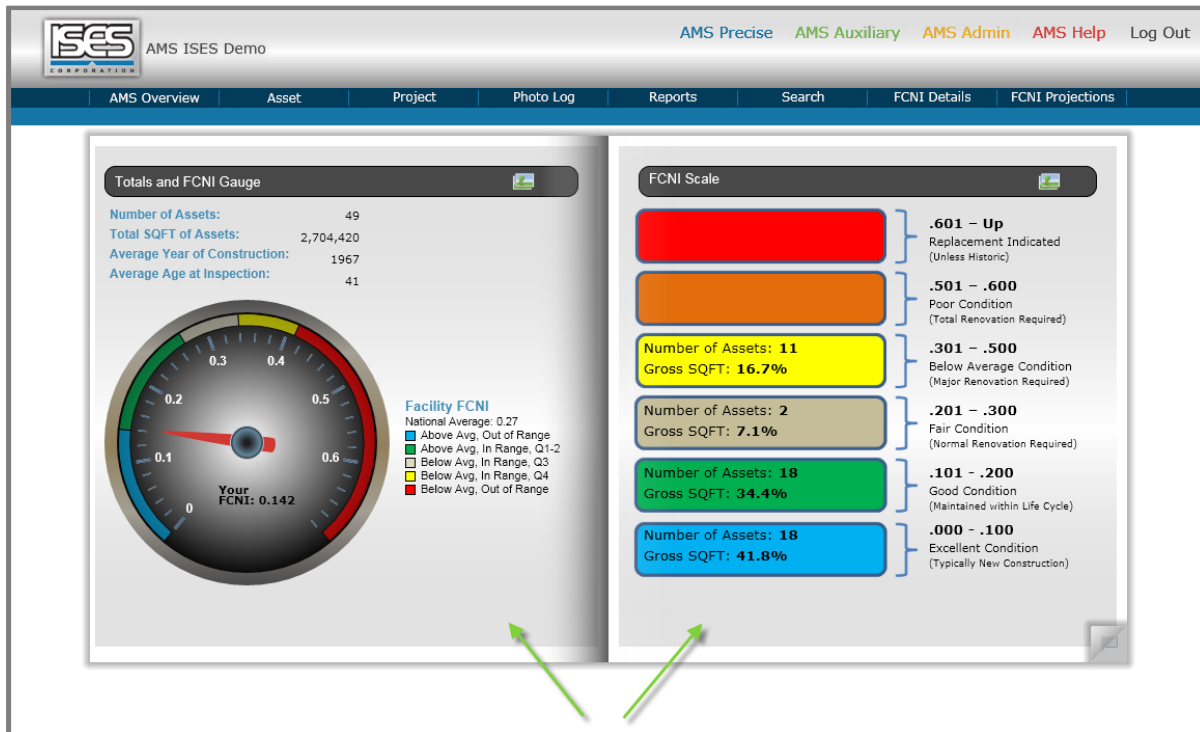


ISES will work with the Client to develop several funding scenarios based on differing targets. Using the modeling function, the required levels of funding to achieve target conditions can be established.

The projections depicted in Figures 10 and 11 are based on the facilities renewal need across the entire facilities portfolio. This need is identified by major building system and priority within a ten-year window. A Facility Condition Needs Index (FCNI) is calculated as a starting point for establishing overall facility conditions:

$$FCNI = \frac{\text{Renewal Costs}}{\text{Current Replacement Value}}$$

Figure 12:  
FCNI Overview



The AMS software calculates various metrics of your asset portfolio and measures the overall FCNI against a national standard. In Figure 12, the right-hand image indicates that for the assets inspected at Baker Hall.

The AMS software also totals the FCNI of the client's portfolio of assets and measures them against the universe of ISES clients' FCNIs, currently more than 250. The "gas gauge" depicted on the left in Figure 12 illustrates this comparison. This image can be exported as a .png for use in presentations.

Figure 13 shows a sample output by building. FCNIs that are greater than 1.0 indicate that the sum of the estimated costs to restore the facility to like-new condition is greater than the hard costs to replace the building.

Figure 13:  
Totals by Building

Executive Summary Facility Condition Analysis Totals by Building All Buildings							
Bld. Code	Building Name	Use	Yr. Bt.	Square Feet	CRV	Project Costs	FCNI Total
101	LOVETT HALL	AD	1912	51,428	\$45,584,482	\$5,146,144	0.11
102	MECHANICAL LAB	CL	1914	23,977	\$11,503,992	\$5,289,974	0.46
104	WILL RICE COLLEGE	DM	1915	74,767	\$35,886,147	\$6,596,173	0.18
105	ALBERT AND ETHEL HERZSTEIN HALL	CR	1914	52,368	\$26,577,048	\$8,197,974	0.31
106	BAKER HALL	DD	1912	88,756	\$46,189,888	\$8,656,396	0.19
107	HANSZEN COLLEGE	DD	1916	90,246	\$43,346,903	\$5,660,702	0.13
109	HOWARD KECK HALL	CL	1925	98,785	\$68,044,364	\$1,382,152	0.02
110	COHEN HOUSE	RE	1928	22,211	\$9,759,921	\$1,573,890	0.16
111	ABERCROMBIE LABORATORY	CL	1946	78,913	\$41,854,334	\$8,390,284	0.20
112	ANDERSON HALL	CL	1949	49,557	\$27,308,393	\$3,729,355	0.14
117	JONES COLLEGE NORTH	DM	1957	36,423	\$16,129,860	\$5,301,590	0.33
118	JONES COLLEGE SOUTH	DM	1957	36,560	\$16,129,860	\$5,237,332	0.32
119	WILL RICE MASTER HOUSE	DM	1957	4,546	\$2,290,605	\$293,206	0.13
120	BAKER MASTER HOUSE	SF	1957	4,184	\$2,431,047	\$301,420	0.12

## Training on AMS

ISES will be pleased to conduct training for a minimum of five (5) individuals in the full operation of the asset management system, as well as providing full administrative training for the designated system administrator. This training is included in our fee quotation. It will be necessary for the Client to provide a computer classroom with access to the Internet for this training session. The user-level training will familiarize users with such functions as project review, editing and creation, backlog reduction entry, building information editing and creation, and report generation.

## Continuing Support

A key component in providing quality service at ISES Corporation is our continuing support past the official end of the FCA process. After all of the reports have been delivered and the final presentation has been made, we remain available to provide continuing support at no additional charge. Such support includes assistance with custom report generation and development of database query strategies. If you have questions concerning items in AMS, please contact us.

## AMS Hosting

ISES provided data hosting is located in the QTS Atlanta Metro Data Center, which is the second largest data center in the world. With this quality provider, we are able to provide a secure and highly reliable software solution to our clients and attain nearly 100% availability.

### General

- Located in Atlanta GA
- Facility has been certified SAS 70 Type II Compliant
- 99.9% network availability
- <45 ms latency

### Backup and Data

- Data will be backed up on a bi-hourly basis between the hours of 7am and 7PM (Monday through Friday)
- Backups will be securely and electronically sent offsite on a nightly basis.
- Retention Policy
  - Daily Backups will be held for 7 days
  - Weekly Backups will be held for 4 weeks
  - Monthly Backups will be held for 12 months
  - Annual Backups will be held for 2 years
- Active data will be available through the life of the contract



## AMS SOFTWARE HOSTING STATEMENT

The ISES AMS database is a mature, ninth-generation system, designed exclusively for the purpose of managing facility condition assessment data. It is the tool utilized by ISES personnel for data development and report generation. For this project, ISES proposes to host the database, under an application service provider (ASP) model. The database system will be accessible via the Internet to anyone designated by the Client as an authorized user. ISES will provide access to this system via our own web servers and will ensure that the system remains available and current.

Although each user of this system in the hosted environment must be a named user, the proposed hosting agreement is not predicated on the number of named users, but rather on the number of concurrent users.

As part of the basic quoted pricing structure, we provide a maintenance service agreement for a minimum of five (5) concurrent users for the annual sum of \$4,975. This hosting fee includes all necessary database license rights, maintenance upgrades, and unlimited web-based training. ISES will provide access and unlimited customer support via email and a toll-free telephone help line. This customer support will include custom report development as requested by the Client. Under the ASP model, the only requirements for your authorized users are Internet access and Microsoft Internet Explorer web browser software. By virtue of ASP hosting, the Client is guaranteed to remain in the most current version available.

ISES will provide one year of hosting, free of charge, with the base proposal. The first year commences upon delivery of final FCA report.