accruent

Accruent Proposal to Lake County, IL

Date Submitted	**07/17/2019**
Account Executive	**Chris Nabers**
Office Phone	**254.931.1884**
Email	**cnabers@accruent.com**

Submitted by **Accruent LLC**

11500 Alterra Parkway
Suite 110
Austin, TX 78758

www.accruent.com

VFA

accruent

TABLE OF CONTENTS

ACCRUENT CAPITAL PLANNING OVERVIEW

Accruent Capital Planning (ACP) has been delivering market leading Facility Condition Assessment Services and related Database Solutions since 1998. Strategic asset management and capital planning is ACP's core expertise. For the past 20 years, ACP has helped over 1000 organizations in education, government, healthcare, and corporate markets to strategically manage more than 5 billion square feet of real estate.

ACP's core business is providing integrated software and services for facilities asset management and facilities capital planning. ACP assists clients in understanding the value of their facilities, infrastructure, investments needed to meet current and future requirements, and the risk to the client's mission resulting from underinvestment in facilities.

VFA, Inc. was acquired by Accruent, the leader in real estate and facilities management solutions, in November 2014. For the years since, Accruent has pursued an acquisition strategy designed to address the fragmentation of real estate and facilities software solutions. By combining the management of the facilities operations and capital planning, the two primary needs of all facilities executives, we now provide a unified enterprise solution combining world-class cloud software and consulting services for facilities strategy, planning, management, and operations. Functionality provided in Accruent's Capital Planning software includes:

VFA.facility

- Produce compelling, detailed analyses, reports, and what-if models to support capital planning decisions
- Forecast the impact of different spending levels
- Ensure cost estimation accuracy
- Prioritize budgets based on funding allocation
- Benchmark progress
- Integrate sustainability into the capital plan

VFA FacilityView

- Quickly Find Assets
- View Multiple Levels of Detail
- Integrate data from other enterprise systems for actionable insights

ACP has assessed more than 150,000 facilities comprising over five billion square feet of space. Facilities types include but are not limited to K12 and Higher-Ed campus buildings, municipal, state and federal government buildings, athletic facilities, office buildings, prisons and court facilities.

ACP's clients are our most valuable asset. We consider all customers as partners and ACP establishes long term working relationships to ensure that our solutions deliver value long after the assessment is completed.

ACP's Professional Assessment staff includes architects, electrical and mechanical engineers with an average of more than fifteen years of professional experience. ACP has over 100 assessors on staff and can deploy multiple teams to multiple locations simultaneously to meet our client's project delivery needs.

ACP provides an integrated and multi-faceted approach to capital planning, to address clients' needs at every stage of the capital planning and management process, from initial assessments through the development of long term capital plans to the development of annual budgets.

We have developed a repeatable, verifiable and IFMA (International Facility Management Association) certified facility condition assessment methodology to support a consistent approach to data collection. ACP incorporates the following industry standards and classifications into its assessment methodology and capital planning software tool: RSMeans Construction Costs (embedded in VFA.facility software), Uniformat System Classifications (Levels 1 through Level 4), and BOMA System Lifecycles.

accruent

FEE PROPOSAL

PRODUCT/SERVICE	DESCRIPTION	FEE
Assessment Services		
Facilities Condition Assessment Services	Comprehensive Facilities and Site Linear Condition Assessments, per Exhibit 1 Building List • 8 Building Assets; 330,107 of Interior SQ FT • 48 Building Assets; 2,978,833 of Exterior Site SQ FT	$133,466
Capital Planning and Management Software		

VFA.facility	VFA.facility Additional Subscription SQ FT:
	
	• Subscription as a Service (SaaS) – 330,107 additional square feet
	   o Unlimited users
	   o Software Implementation included
	   o Includes Software Maintenance and Upgrades
	   o 24/7 Customer Support
	• Begins on 01/01/2020
		$1,871

	TOTAL	**$135,337**

Notes

1. Fees are valid for a period of 180 days from the date of the Budgetary Quote.

2. Budgetary Quote includes reasonable and customary expenses.

3. Accruent reserves the right to request a change order should the scope and square footage change

4. Assessment services and SaaS are subject to Accruent's Agreement with Lake County, IL: NCPA Contract 02-47.

Exhibit 1 Building List

Interior Facilities Condition Assessments	
Building Name	**SQ FT**
19th Judicial Courts Criminal Courts Tower	220,000
19th Judicial Juvenile Detention Center	39,000
Babcox Justice Center	25,000
Multi Dept Storage Facility/Evidence	20,000
HD Zion Clinic/ NE Satellite	16,000
Des Plaines River Wastewater Treatment	3,510
Mill Creek Water Reclamation Facility	2,500
NCT Water Reclamation Facility	4,097
TOTAL	**330,107**

Exterior Site Condition Assessments	
Building Name	**EXTERIOR SQ FT**
19th Judicial Courts Criminal Courts Tower	4,500
County Employee Garage	7,500
Administrative Tower "A"	24,500
Administration Building "B"	See "A" Tower
19th Judicial Courts Complex	See "A" Tower
19th Judicial Public Defender's	3,000
19th Judicial Adult Probation	8,000
19th Judicial Park City Branch Courthouse	72,800
19th Judicial Mundelein Branch Courthouse	140,000
19th Judicial Round Lake Beach Branch Courthouse	100,000
19th Judicial Juvenile Detention Center	319,000
Coroner's Office	1,500
Babcox Justice Center	202,000
Babcox Work Release - Community Base Correctional Center	Included Above
Multi Dept Storage Facility/Evidence	34,000
Training Facility	161,500
Central Permit Facility	355,800
Women's Residential Services	50,000
3002 Grand Ave	334,233
3004 Grand Ave	Included Above
3010 Grand Ave	Included Above
3008 Grand Ave	Included Above

HD Zion Clinic/ NE Satellite	40,000
DOT Administration Building (Traffic Management Center)	794,000
DOT Building "A", Light-Duty Vehicle Maintenance Shop	Included Above
DOT Building "B", Heavy-Duty Maintenance & Fabrication Shop	Included Above
DOT Building "B-1" Welding Shop	Included Above
DOT Building "C", Body Shop, Grader Barn, Truck Wash Bay	Included Above
DOT Building "D", Truck Storage Building	Included Above
DOT Building "E", Sign Shop	Included Above
DOT Building "H", Facilities Maintenance Shop	Included Above
DOT Building "I", Storage Building	Included Above
DOT Building "J", Equipment & Materials Storage	Included Above
DOT Building "K", Storage Building	Included Above
DOT Building "L", Fuel Island Building	Included Above
DOT Building "L", Salt Storage Dome Facility #1	Included Above
DOT Building "N", Salt Storage Dome Facility #2	Included Above
DOT Building "O", Winter Liquid Blending Building	Included Above
DOT Satellite Garage	10,500
Des Plaines River Wastewater Treatment	22,500
Mill Creek Water Reclamation Facility	35,500
NCT Water Reclamation Facility	32,000
PW Administration Building	226,000
PW Cold Storage	Included Above
PW Maintenance Garage	Included Above
PW Storage Bin	Included Above
TOTAL	**2,978,833**

COMPREHENSIVE FACILITY CONDITION ASSESSMENT

Accruent Capital Planning has no "design-build" or other construction management aspirations. Consequently, assessment data garnered by ACP is independently objective and untainted by the "stakeholder mindset."

Accruent Capital Planning (ACP) provides consistent, reliable data and transparent, easy-to-follow program management advice that will enable you to effectively and efficiently manage your facility capital program. Figure 1 shows ACP's process for conducting facility assessments and providing deliverables that enable customers to more effectively manage their asset portfolios.
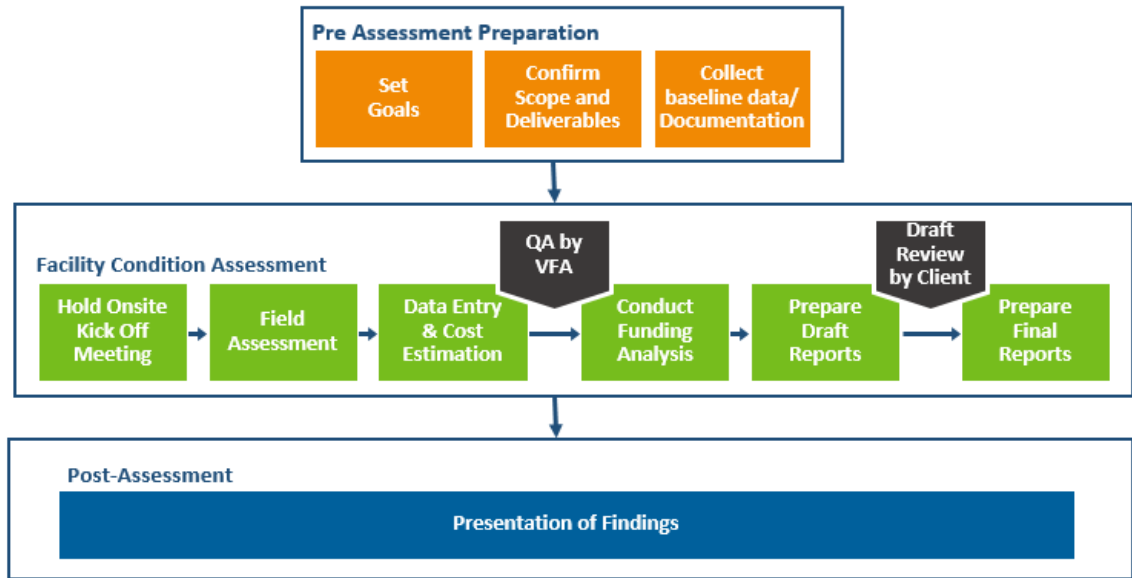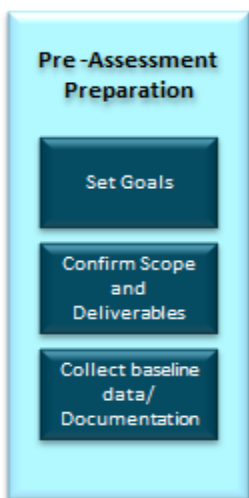

Pre Assessment Preparation

| Set Goals | Confirm Scope and Deliverables | Collect baseline data/ Documentation |

Facility Condition Assessment

Hold Onsite Kick Off Meeting → Field Assessment → Data Entry & Cost Estimation → **QA by VFA** → Conduct Funding Analysis → Prepare Draft Reports → **Draft Review by Client** → Prepare Final Reports

Post-Assessment

Presentation of Findings

Figure 1 ACP's assessment process has been refined and proven through the assessment of more than 5 billion square feet of assets under management.

Details about each phase of this process are provided in the following sections.

Pre-Assessment Preparation

Set Goals

Confirm Scope and Deliverables

Collect baseline data/ Documentation

Pre-Assessment Preparation Phase

Set Goals - To kick off the project, ACP will set up a meeting (either via teleconference or in person) with your key stakeholders to confirm the goals and objectives for the project. Understanding what you want to achieve with this project is the key to its success and will drive the project effort. This will ensure that the end deliverable is exactly what you are expecting and will best meet your goals.

Confirm Scope and Deliverables - During this planning phase, ACP will work with your key stakeholders to establish and document the parameters for the assessment / survey. A scoping meeting (also via teleconference or in person) will be held to discuss and confirm schedules, assessment/survey criteria, data classifications, prioritizations and categorizations, and the best method for storing asset data to support your analysis, reporting, and planning needs. Often the goal setting and confirmation of scope and deliverables can be discussed and agreed in one meeting.

Collect Baseline Data / Documentation - The ACP team will communicate with your facility managers, plant maintenance managers, and staff members (via email or teleconference) to help them gather information that the ACP assessment and survey teams will need. This data typically includes asset location, number, use, and name, dates of initial construction and any renovations, number of floors, gross area, and any other relevant data. Data that will be uploaded into VFA.facility must be provided to ACP in spreadsheet or database format. Additionally, any information regarding

site maps, principal asset activities, occupancy schedules, any outstanding asset code violations, recent studies such as ADA or roofing inspections, that are provided to ACP, and that will impact how ACP conducts our assessment work, will also be reviewed.

As a result from the discussions of the scope parameters, ACP will configure our software tools to align with the level of assessments / surveys agreed to in the workshop. Data points like prioritization schemes, systems to be assessed and level of detail required will be setup and configured.

The Assessment phase is the on-site work performed by ACP's assessment team and subsequent data entry/analysis done at ACP's offices. By the end of this stage, the assessment data will be collected and populated in VFA.facility; this includes analysis of the data, such as cost estimates for corrective actions.
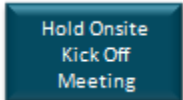
Hold Onsite Kick Off Meeting On the morning of the first day of the field visit, ACP will organize a meeting with the staff that will be involved with the field assessment phases of the project to kick off the on-site survey work. This meeting will enable your staff to meet the ACP assessment team and understand the project schedule. It will also include discussion of the logistics of the site visit, such as gaining access to all elements of the facility, and other practical information important to undertaking the physical assessment. ACP will ensure that all functional teams understand project objectives, conditions, and goals.

As part of the meeting the following information is typically discussed as part of our assessment needs:

- Basic Building Information
- Systems to be assessed
- Special data that needs to be tracked
- Previous assessments performed and success rates working with the results
- Current process for Capital Planning
- Assessment Logistics
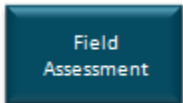
Field Assessment ACP's team will visually inspect all of the assets included in the scope of the project to identify deficient conditions and assess the remaining lifecycle of designated asset systems. The teams will document requirements, including digital photographs of asset exteriors and any observed conditions within the assets. The survey will include a visual inspection of the building and all of the building's architectural, mechanical, and electrical systems listed in Table 1.

Substructure	Fittings	Fuel Pumps & Storage Tanks	Plumbing Fixtures
Superstructure	Stairs	Fire Suppression	Domestic Water Distribution
Exterior Walls	Wall Finishes	Electrical Service & Distribution	HVAC Systems
Exterior Windows	Floor Finishes	Lighting & Branch Wiring	Heat Generating Systems
Exterior Doors	Ceiling Finishes	Communications & Security	Cooling Generating Systems
Roofing	Conveying	Fire Service Water	Distribution Systems
Partitions	Steam	Electrical	Terminal & Package Units
Interior Doors	Chilled Water	Chillers/Boilers	Controls & Distribution
Interior Walls/Flooring	Compressed Air System	Telecommunications & Paging	Vertical Transportation

Table 1 ACP assesses architectural, mechanical, and electrical systems as classified by the Uniformat standards.

The inspection of the asset interiors will include all mechanical and electrical rooms, as well as a representative sampling of rooms. Resultant requirements will be identified for the entire asset or system (not by individual room or component). The inspections of the asset exteriors will include an approximate ten-foot perimeter around the asset and the areas adjacent to and/or attached to the asset that are inherent to the asset's use, such as ramps, stairs, paving, landscaping, and exterior, wall-mounted lighting.

ACP does not include intrusive and destructive testing such as infrared, roofing core sampling, soil testing, generator testing, and hazardous material testing as part of the standard assessment methodology. If observed field conditions warrant further testing, ACP will make recommendations for such investigation as appropriate.

EXTERIOR SITE ASSESSMENT SERVICES

Table 1 *Accruent assesses site systems as classified by the Uniformat standards.*

Site Utilities	• Electrical Distribution • Domestic Water • Site Lighting • Sanitary/Combined Sewer	• Fuel Supply • Chilled Water and Hot Water • Site Communications & Security
Site Surface Structures	• Roadways • Pedestrian Paving • Parking Lots	• Pathways • Storm Water Management Ponds • Surface Draining Structures, etc.

Site Utilities and Surface Structures: The assessment of site utilities and surface structure assets will include the major systems listed in table 2 above. Visible and non-visible systems and system components will be evaluated by an assessment team member with experience in the specific technical discipline relevant to the system.

Visible surface systems will be evaluated by physically touring the site, review of institution maintenance records, and by in-depth interviews of facility personnel with historical knowledge of each of the assets. Where site system utilities are buried or otherwise inaccessible, Accruent will interview institution personnel and review institution maintenance records to gain insight and gather information related to system type, age, quantities, and condition in order to construct accurate cost estimates.

For each building asset currently in VFA.facility, Accruent will create a Site Asset then develop site systems under the asset to quantify value and capital needs of the property. Items requiring a corrective action as well as long-term renewal costs for each asset will be identified. Where applicable, an asset may be divided into sections for the development of replacement value and FCI. The division of an asset will be done by appropriate sections such as functionality, street, specific site area, age, or size. The final list of assets, and divisions of each if necessary, will be reviewed and approved prior to finalizing the assessment documents. The assessments of the site utilities and surface structures will include up to and including the exterior disconnect of the service.

Accruent does not include intrusive and destructive testing such as infrared, roofing core sampling, soil testing, generator testing, and hazardous material testing as part of the standard assessment methodology. If observed field conditions warrant further testing, Accruent will make recommendations for such investigation as appropriate.

Data Entry & Cost Estimation

After the on-site work is complete, the survey team will review their notes and findings and begin entering all of the collected data into VFA.facility. This will include descriptive narratives, field entries, and photos as described in the following list:

- *Asset Descriptions*: A narrative summary of each assessed facility will be documented in the asset description. Additional details of each of the asset's systems will be recorded in system descriptions. This information is useful for having documentation regarding the basic information about an asset, such as construction information.

- *System Models and Conditions*: Assets (buildings) are broken down into their component systems in the database. These system models provide an up-to-date record of what exists within the building at the time of the assessment (i.e., what type of roof?), and how much of it is present (i.e., how much acoustical ceiling tile vs. gypsum wallboard ceilings). System models record the expected useful lifespan of each system (i.e., how long should this roof last?) and how much useful life remains based on the visual inspection (i.e., how long can we expect the roof will last?). A replace-in-kind replacement value is established for each system as well as a projected renewal cost (i.e., how much should we expect to pay when the system is at the end of its life?). Based on the information gathered in the inspection, you will have an understanding of the reinvestment rate required on an annual basis to replace system components that have reached or exceeded the end of their useful lives.

- *Requirements:* Requirements are issues such as systems or components that are unsafe, broken/damaged, can no longer perform the intended function, are approaching or have exceeded their useful life spans, do not conform to current codes, or may be an improvement to the facility, such as an energy conservation project. The survey will typically include capital needs rather than operational, such as major repair to air handling unit vs. changing a fan belt. (Capital vs. operational expenses is often set by a dollar minimum threshold, such as $5,000 and will be agreed upon at the beginning of project.) Each requirement is individually classified by priority, category (cause of issue), system, and inspector, thereby allowing for multiple queries and flexible data analysis. If required, additional classifications for specific needs can also be created by the project manager or your site administrator.

    o Each Requirement must be assigned a Priority that indicates its severity and the ideal time frame for correction. The ACP standard Priorities are described in detail below.

    The chart below lists the current default Priorities along with their definitions and default years offset. These Priorities, their Descriptions and years offset may be modified based on client preference. Depending on the selected Priority's number of years offset, the Observed Years Remaining should be adjusted accordingly when following the Requirement Renewal Method. Standard definitions of priorities are provided in Table 2. ACP will work with you to determine the specific priorities to be used for this project.

Priority	Definition	Years Offset
Priority 1	Due within 1 Year of Inspection	1
Priority 2	Due within 2 Years of Inspection	2
Priority 3	Due within 5 Years of Inspection	5
Priority 4	Not Time Based	null

Table 2 Priorities associate requirements with a timeframe; standard priorities shown here can be tailored to meet client requirements.

    o Each Requirement must be assigned a category that indicates the general issue or the reason for the deficiency. The standard Requirement Categories, listed below, include a broad range of topical causes for adding the Requirement to the Asset, but may be customized by the client if necessary.

    While the software allows a user to assign a parent or child category to a Requirement, the ACP standard is to use the child categories only. All types of Requirements can be categorized within the child categories, and doing so allows for a more precise classification of the issue. Standard categories are shown in Table 3.

Category	Sub-category
Integrity	• Lifecycle • Reliability
Regulatory	• Life Safety • Building Code • HazMat • Accessibility
Optimization	• Technological Improvements • Capacity • Mission • Maintenance • Abandoned • Energy • Sustainability

Table 3 Categories group requirements by cause or reason.

o *Corrective Actions:* ACP's assessors will recommend a corrective action for each requirement. The actions are based upon the materials and equipment required to repair or replace the identified deficiency along with necessary labor. ACP will work with your organization to identify any soft costs (e.g., permitting fees, project management fees, etc.) that should also be included.

Digital Photos: ACP will import digital photos taken during the assessment to visually illustrate existing conditions. A selection of photographs of the asset exterior and the critical requirements within each asset will be stored and linked to requirements where a supporting photo is beneficial.

QA by VFA

ACP ensures a quality project through a comprehensive Quality Assurance program. Data is reviewed by team members, project managers, and the designated QA manager for the project before submission to you for review.

Conduct Funding Analysis

Data in VFA.facility will be used to determine the long-term system renewal costs and timing, develop multiple funding options, and perform a comparative analysis of these funding options; these analyses will be discussed with you. The ACP Team will equip your organization with information to make sound decisions about long-term capital reinvestment in your existing buildings. ACP understands that facility conditions are not the only factor in determining what renovations, replacements, or repairs to undertake, and are in many cases considered in support of other drivers such as impact on mission, risk, space planning needs, or changes in use.

After the facilities assessment data has been entered into the database and action methodologies and costs have been established, benchmarking the condition of the facilities can begin. ACP has automated a standard process to assess the relative condition of assets, facilitating comparison both within and among organizations and locations. A Facility Condition Index (FCI) will be calculated for each asset (building) evaluated, providing a key benchmark indicator to quantify the condition of the property (see Figure 2). It is calculated as the deferred maintenance and renewal needs (typically over a 5 year period) divided by the current replacement value of the building. The lower the FCI value, the better the condition of the building.

Your organization will be able to ascertain the impact of various funding levels on the FCI of the assets, or alternatively, the funding requirements to achieve a specific asset FCI.
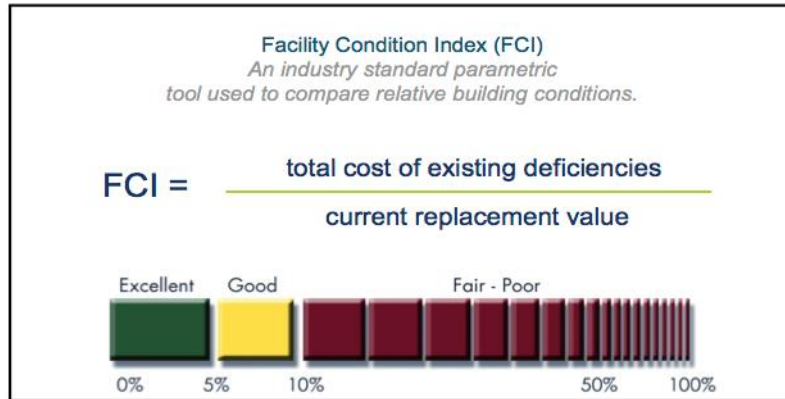
Figure 2 FCI is an extremely useful metric for assessing asset condition.

Based on the criteria selected (i.e., assets, building systems, requirement priorities and categories, number of years forecasted, etc.), VFA.facility will calculate the long-term renewals for the assets and systems included in the project utilizing the previously developed system model and systems conditions evaluation. In addition, ACP will also explore and analyze alternative funding strategies for restoring and maintaining a targeted level of asset condition. By varying levels of funding, timing, and project content, the impact on facilities/infrastructure condition over time can be understood. These alternative strategies will be reviewed and discussed with your organization.

Using these analytical capabilities, competing funding requirements can be analyzed based on criteria and logic that ACP will establish with you to ensure consistent, equitable, goal-oriented, needs-based, and efficient capital planning. The resulting funding analysis can then be used by you to establish funding levels to support the development of your capital plan.
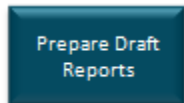
Prepare Draft Reports During this phase, ACP's capital planning and management software will be used by ACP's assessors to determine the long-term system renewal costs and timing, multiple funding options will be developed, and a comparative analysis of these funding options will be discussed with you. A preliminary draft report will be submitted 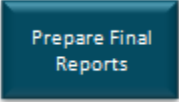to you after the data has been evaluated and entered into VFA.facility. This preliminary report will give you an opportunity to review content, including a review of data classifications (such as priorities, categories, and systems), general consistency of overall estimates, and report formats.

The draft report will contain:

- Narrative Summary: A complete description of the facility and a summary of deficiencies listed within each section of the detailed report. (Asset lists and summaries – by age, use, FCI)

- Digital Facility Photographs.

- Facility Work Type Summary: A summary breakdown of type of work and total costs for each facility. (Deferred maintenance summaries – presented by priority, system and category and cross tabular format)

- Facility System Summary: A summary breakdown of the total costs for a facility by assessed system. (System renewal forecasts and SCI reports)

- Major Deficiency Photographs: By inspection types using digital cameras

- Inspection Details: This report is divided by inspection type for each facility (Asset snapshots – asset descriptions, systems information, requirement lists)
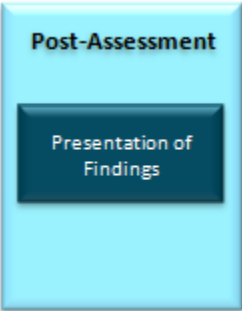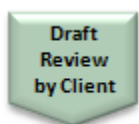
Draft Review by Client In addition, ACP will establish a read-only user account during the course of the project which will allow your personnel to monitor progress, review data, and make comments on facility assessment data once it has been submitted for review.

Following your review of the Draft Building Evaluation Report format, the ACP Project Manager will make any adjustments to the format of the report and will prepare The Final Building Evaluation Report for the remainder of the assets. The Final Building Evaluation Report will document the findings and present analyses of the FCA, and will include the following sections:

- Executive Summary

- Assessment Methodology

- Funding Scenarios

- Capital Renewal Requirements

- Client Summary Data Reports (Requirement Summaries and Cross-tabular Reports)

- Detailed Requirement Reports (Including Asset Summary, Requirement Descriptions)

Post-Assessment Phase

Once the assessment and analysis is complete, ACP will present their findings and assist you to become self-sufficient in maintaining the data and reporting from the software.

Presentation of Findings - The final key step in the assessment process is the Presentation of Findings. This is a formal meeting, presented by the ACP Project Manager or Project Director via WebEx or at your site to present the final results of the assessment. The data will be presented logically and methodically.