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2016 Capital Renewal Training

How to update facilities condition and backlog

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Contents

2016 Capital Renewal Training 1
Background 3
Applicability 3
Key Dates for Updating Building System information 3
Website: 3
http://capitalrenewal.sightlines.com/ 3
Orientation – Capital Renewal Home Page 4
Main Navigation: 4
Step #1: Update Inventory for any known building changes. 5
UPDATING OR REMOVING BUILDING DATA 8
ADDING A BUILDING 9
Step #2: Reset Renewal Data 10
Step #3: Update Infrastructure by clicking *Next Step* or *Data Updates>Update Infrastructure* 14
Step #4: Review Results 15
Step #5: Submit Profile 15

Background

On January 1, 2015, Sightlines launched the new Capital Renewal (CR) website, which replaced the legacy Facilities Reinvestment & Renewal Model (FRRM). The purpose of this update process is two-fold:

- To forecast the current **backlog** and
- Predict the future **renewal needs** for the system

Each year, campuses update their current building conditions. The system will publish the results as the 2016 MnSCU Facilities Condition Report.

Applicability

The changes should reflect any changes in buildings and building systems that are placed in service or taken out of service between July 1, 2015 and June 30, 2016.

Key Dates for Updating Building System information

April 14 – May 31, 2016	Capital Renewal is open for updating Roof data updated
June 1 – June 30	Verification of data Corrections and adjustments
July 1, 2016	2016 MnSCU Facilities Report

Website:

http://capitalrenewal.sightlines.com/

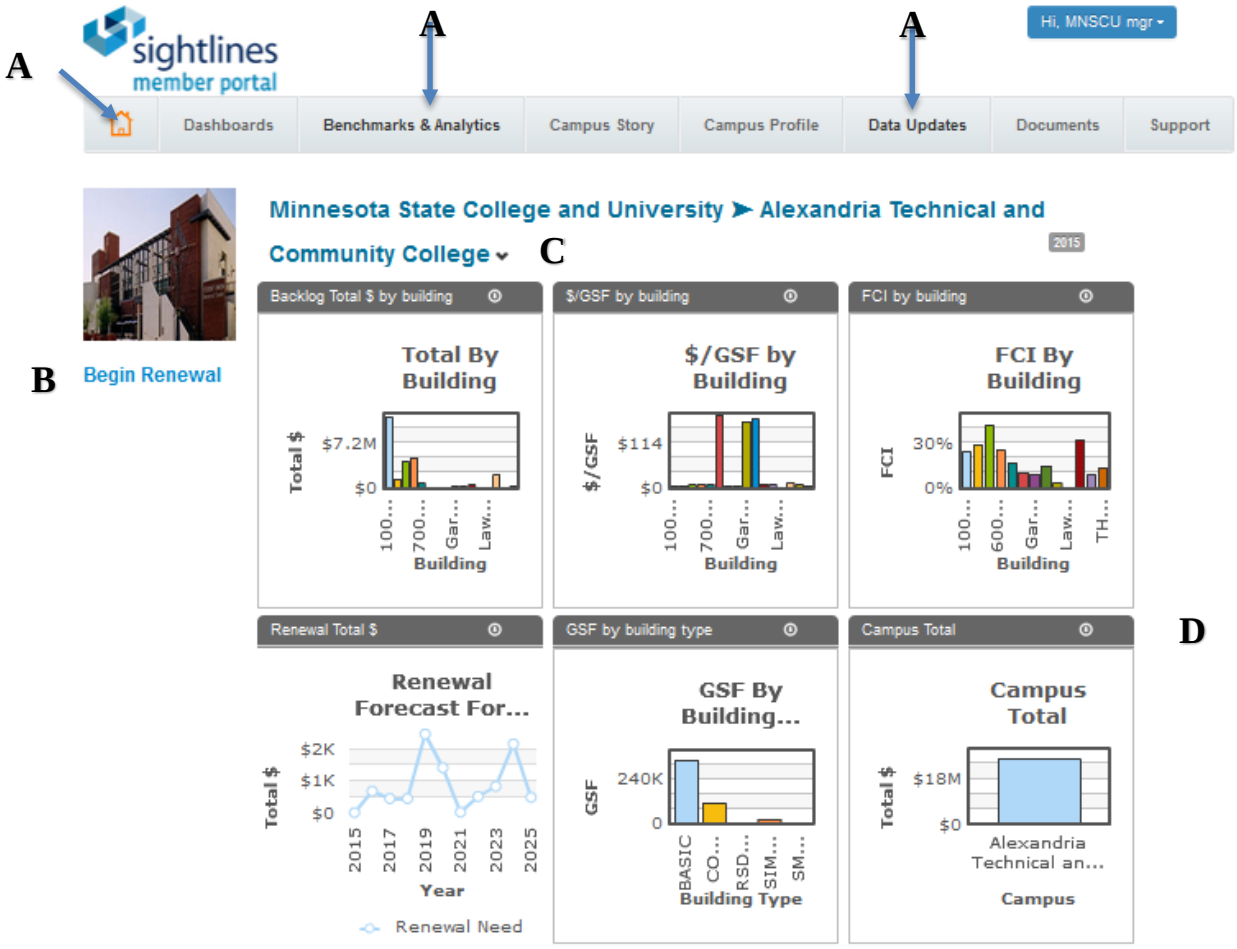
Works in Google Chrome, Mozilla Firefox, Internet Explorer, and most other browsers

Orientation – Capital Renewal Home Page

The page below is what will greet a campus at first log on. You'll first notice a totally different interface, and the new tool blends a number of feature sets, not all of which are available to our system (gray), but which still provide the same functionality as the original Facilities Reinvestment and Renewal Model (FRRM). Here's a brief orientation:

Main Navigation:

A: Active links to navigate the tool for reports and data updates
B: Link to start inventory update
C: Campus selector
D: Key Performance Metric Dashboards



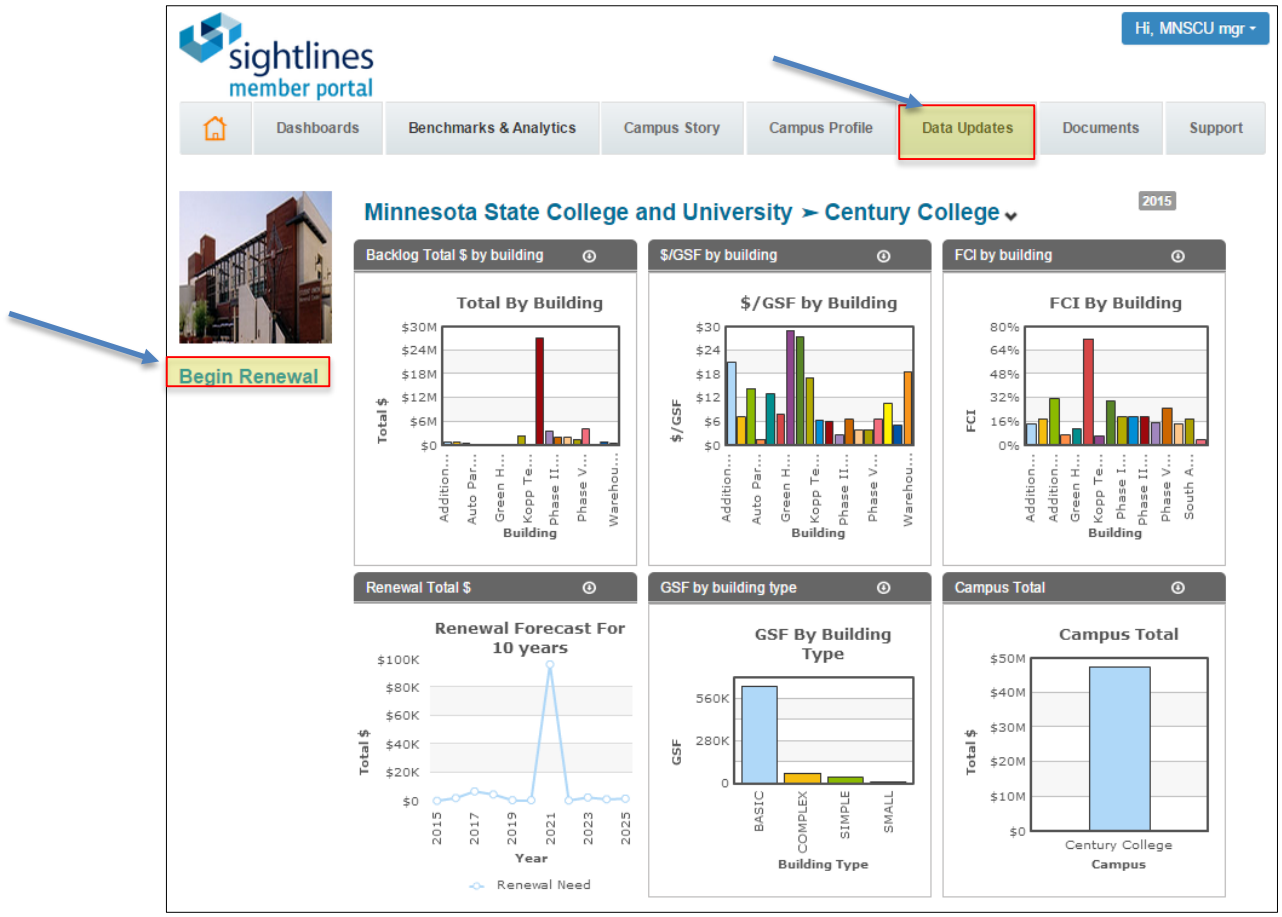
Before you Begin…

1. **Run your 2015 campus reports**
2. **Collect your details of new buildings and building systems that occurred in FY2016**

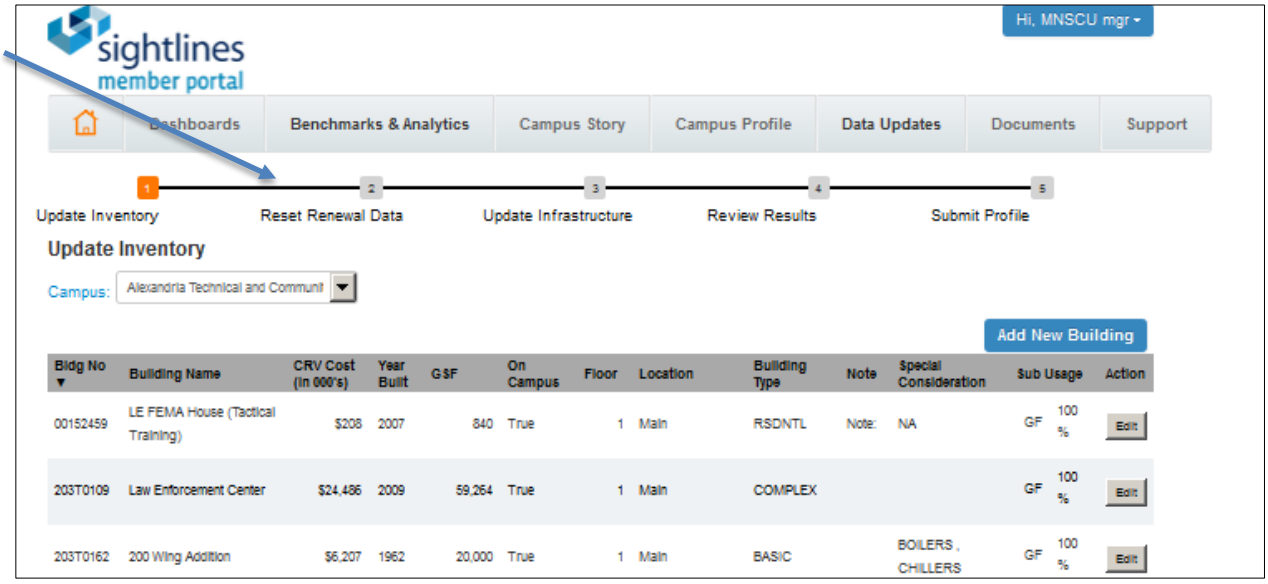
Step #1: Update Inventory for any known building changes.

These might include new buildings that should be added (brought in service) or buildings that should be removed (demolition) and upgrades to the major building systems.

Online Process: click *Begin Renewal* or *Data Updates>Update Inventory*



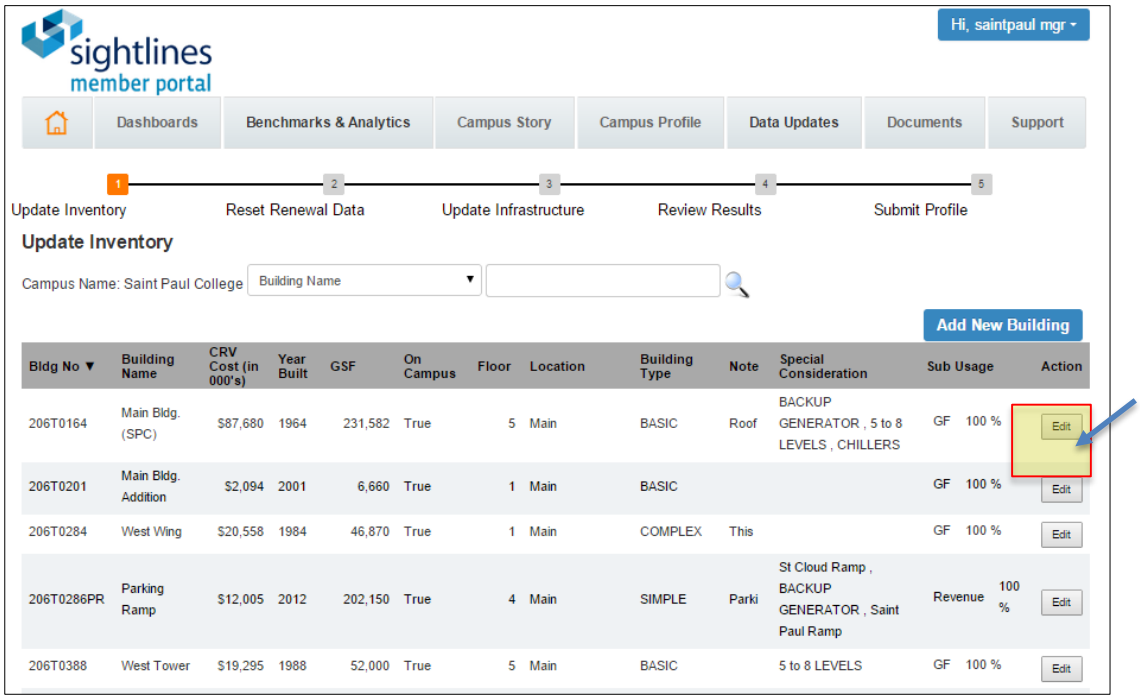
Progress Tracker. Menu bar at the top of the back to track progress.



UPDATING OR REMOVING BUILDING DATA
EDIT FUNCTION

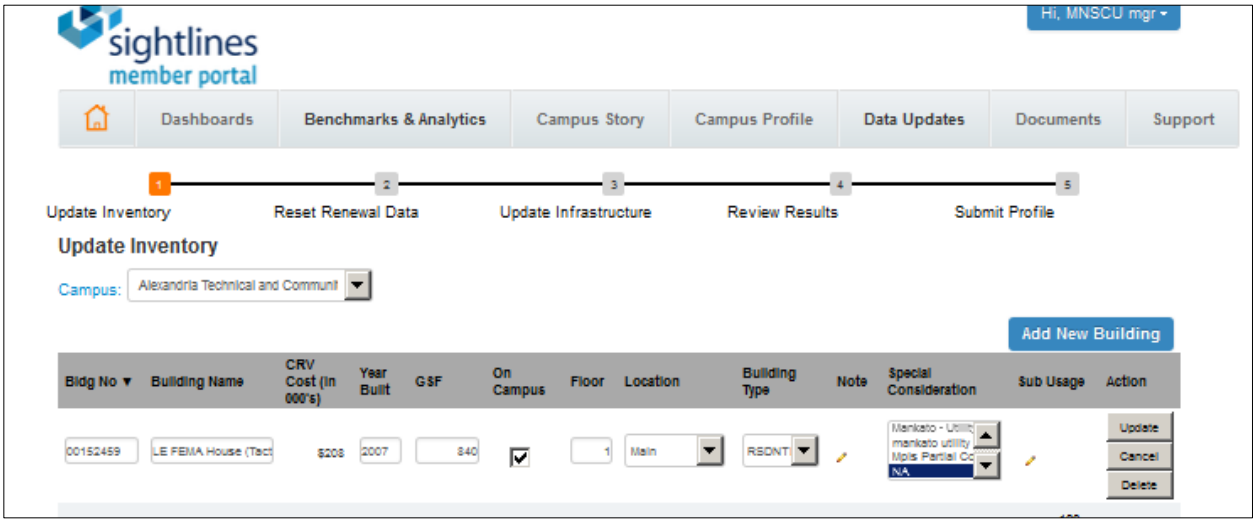
To edit a building or building systems (modify or remove):

- Click "Edit" next to the appropriate building line and adjust the fields that are required. To **delete** a building you also select "Edit"



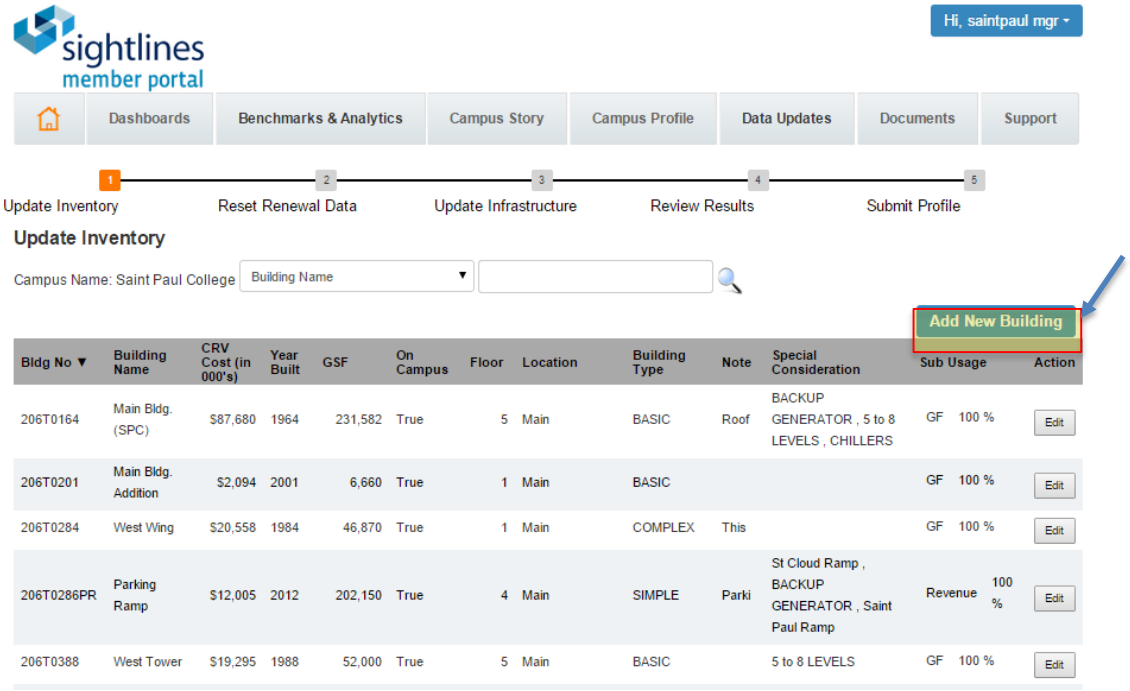
ACTION

- After Selecting the Edit box for the line / building you'd like to modify, the line will expand to identify "Action". Other than the drop down menus, there are three choices: UPDATE, CANCEL or DELETE.

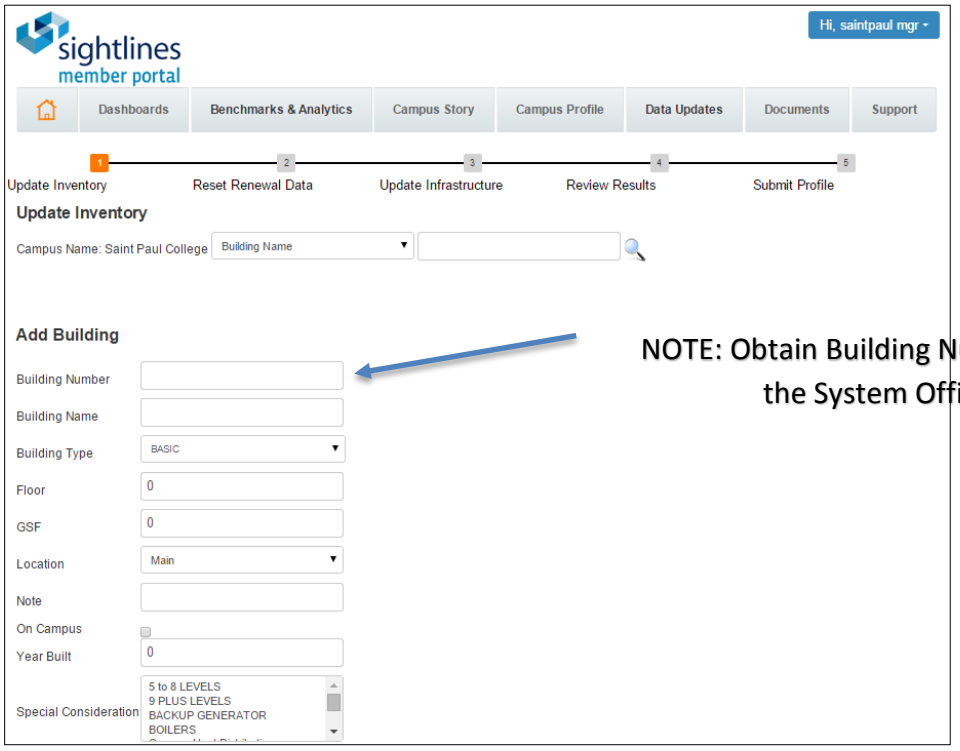


ADDING A BUILDING

Click “Add New Building” button in upper right hand corner



Adding a building (continued):

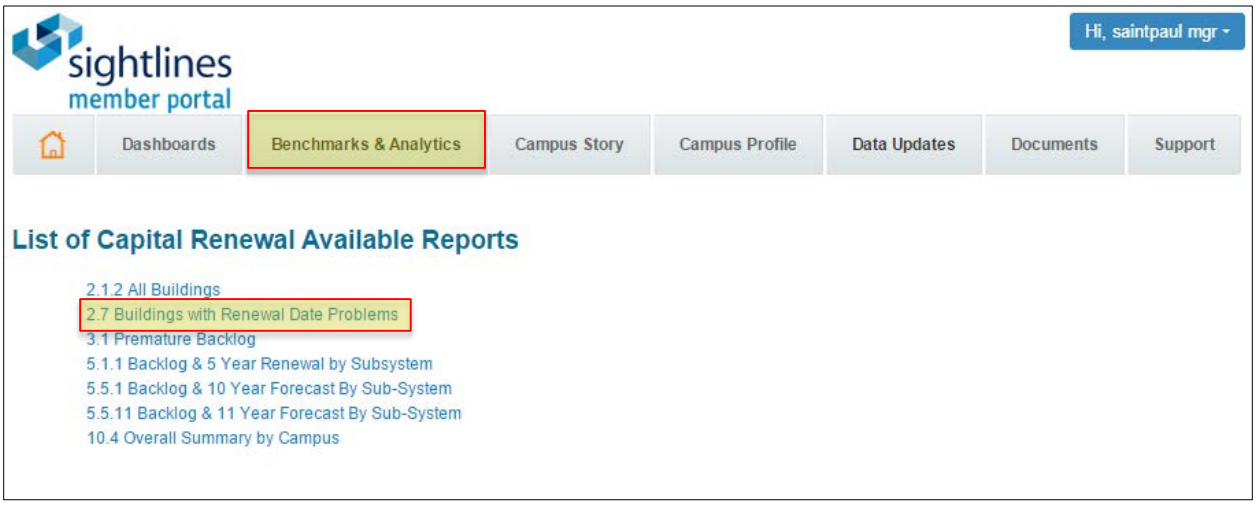


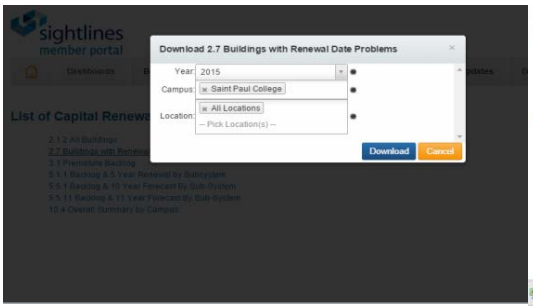
NOTE: Obtain Building Number from the System Office

Step #2: Reset Renewal Data

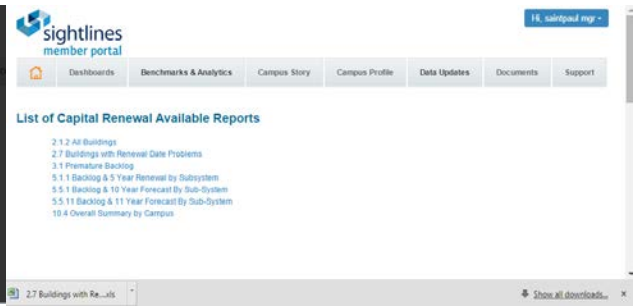
Part A: Running the "Buildings with Renewal Date Problems" Report

a. Go to "Benchmarks and Analytics" on the top ribbon (see below)
b. Run report 2.7 "Buildings with Renewal date problems". This report will identify all the sub-systems that came due in 2016 or previous years and were NOT reset. Priority #1 is to reset all the renewal dates that show up in this report.
c. When running report 2.7 select 2016 for the year, your campus, and all space. Then hit download.
d. Ideally NO sub-system will show up in this report and then you can proceed to update backlog line items or years 2016 and beyond.





Report Search View

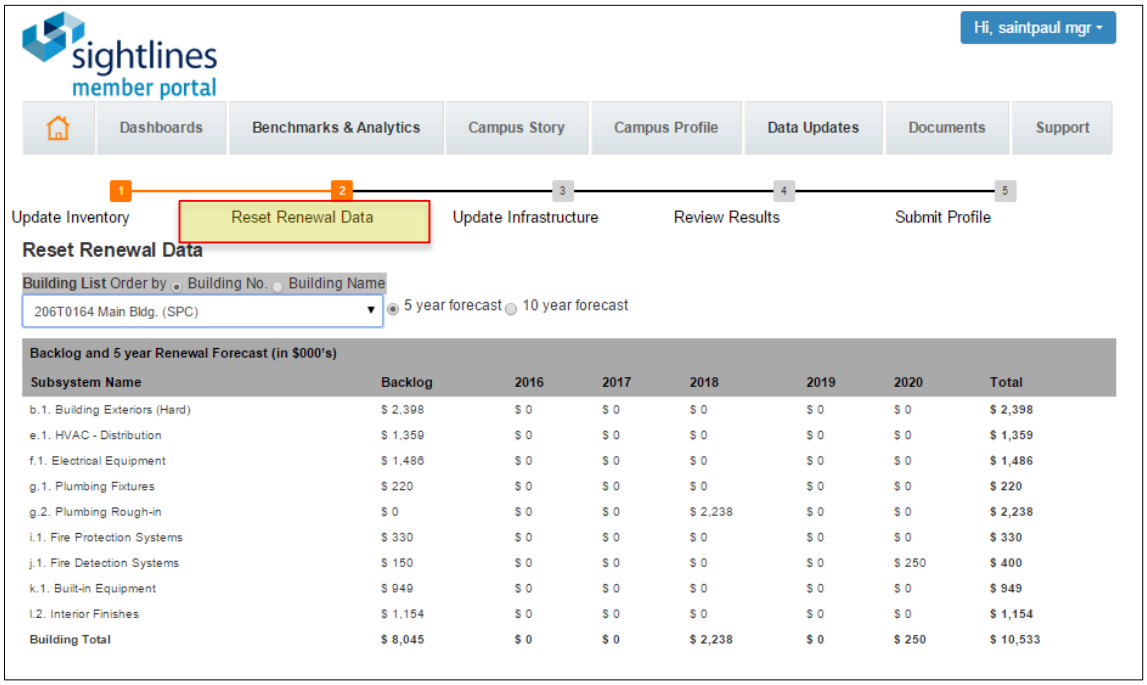


List of Reports

Part B: Resetting Renewal Data

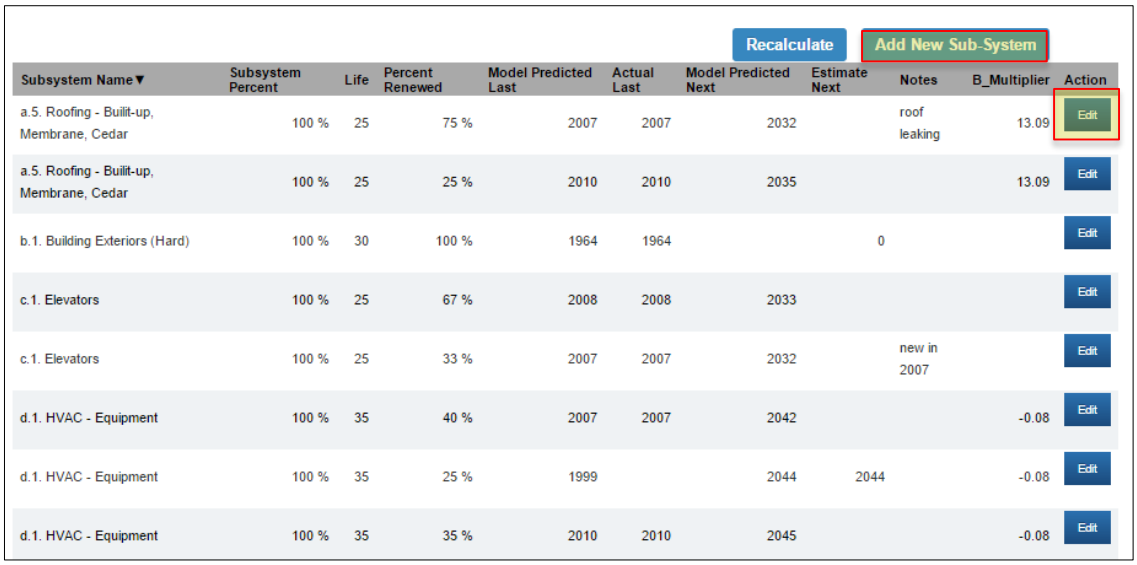
The menu bar at the top of the page identifies that you're in step #2 "Reset Renewal Data"

The building sub-system information is on the same page as the building costs. You can toggle between buildings and 5 or 10 year capital forecast. This allows you to edit a renewal date of a sub-system and hit recalculate and the costs will be reflected above.



RESET OR ADJUST RENEWAL DATA

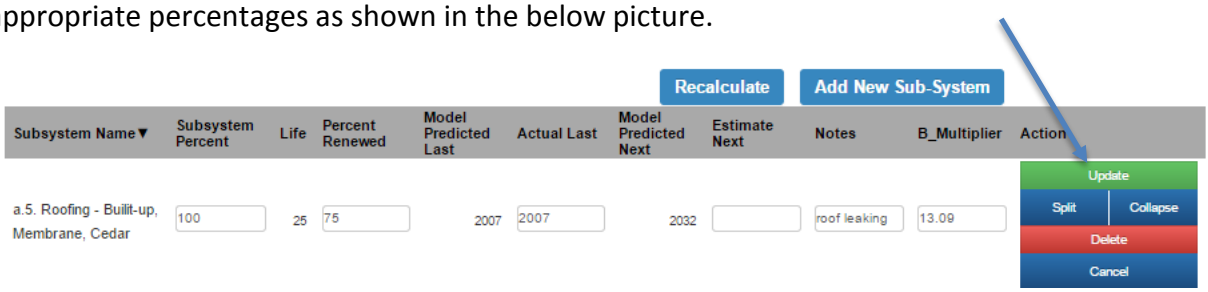
To reset any renewal dates your first step is to hit the edit button. To add a new sub-system you would hit, Add New Sub-System. To delete a sub-system you would hit edit.



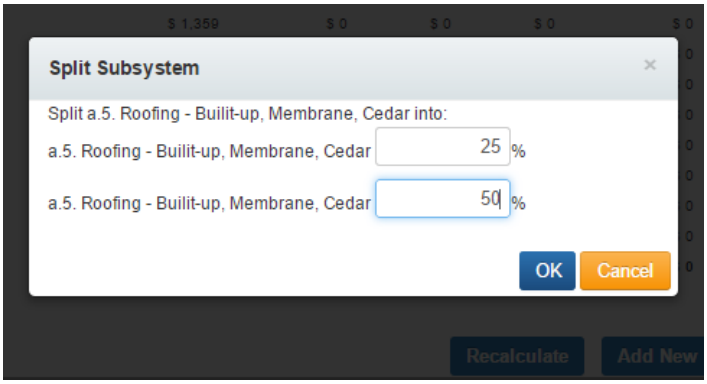
Subsystem Name	Subsystem Percent	Life	Percent Renewed	Model Predicted Last	Actual Last	Model Predicted Next	Estimate Next	Notes	B_Multiplier	Action
a.5. Roofing - Builit-up, Membrane, Cedar	100 %	25	75 %	2007	2007	2032		roof leaking	13.09	Edit
a.5. Roofing - Builit-up, Membrane, Cedar	100 %	25	25 %	2010	2010	2035			13.09	Edit
b.1. Building Exteriors (Hard)	100 %	30	100 %	1964	1964		0			Edit
c.1. Elevators	100 %	25	67 %	2008	2008	2033				Edit
c.1. Elevators	100 %	25	33 %	2007	2007	2032		new in 2007		Edit
d.1. HVAC - Equipment	100 %	35	40 %	2007	2007	2042			-0.08	Edit
d.1. HVAC - Equipment	100 %	35	25 %	1999		2044	2044		-0.08	Edit
d.1. HVAC - Equipment	100 %	35	35 %	2010	2010	2045			-0.08	Edit

UPDATE OR SPLITTING A SUBSYSTEM

When you hit the edit button various options will come update. You can delete the sub-system, cancel, split, or collapse. If you want to split a sub-system you would hit split and then enter the appropriate percentages as shown in the below picture.



This split will then add two line items to the building. If you need more line items continue to hit the split button. To collapse all the sub-system into one line item, hit collapse.



RECALCULATE

1. ***After making any changes/additions/deletions to subsystems, you must click RECALCULATE. This will save the changes you made.***

2. ***<u>If you do not click RECALCULATE, your changes will not save.</u>***

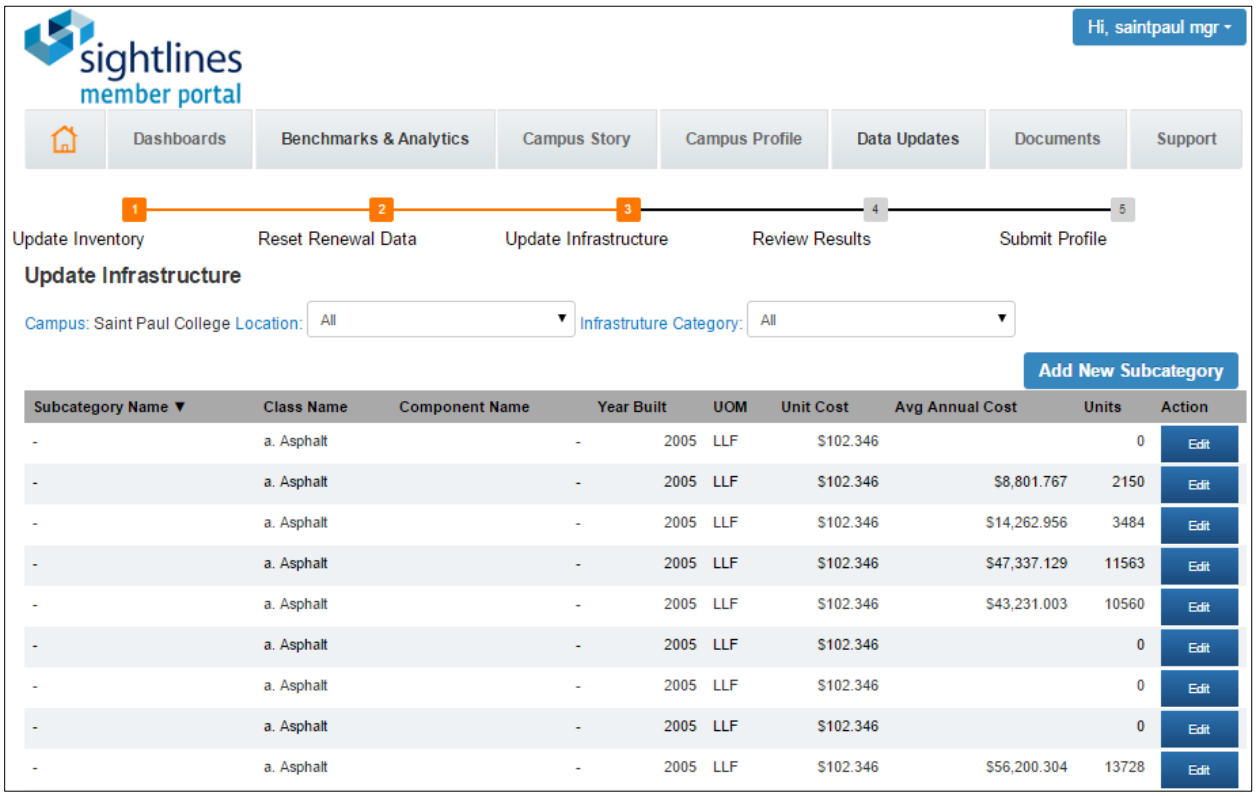
FURTHER ACTIONS FOR BUILDINGS WITH RENEWAL DATE PROBLEMS

For each sub-system that was identified in the 2.7 report following actions need to be taken. Additionally, the below actions need to be addressed for anything in backlog, entering backlog, or other changes over the next few years.

i. **Whether or not this subsystem should be put into backlog.** If it is in backlog, then a zero will need to be entered into the *Estimate Next* cell for that building and subsystem in the *Reset Renewal Data* section.
ii. **Estimating Remaining Life on Building Subsystems.** If it is not in backlog, then an estimate will need to be made as to how many years of remaining life the subsystem has, and the *Estimate Next* cell will need to be updated appropriately for that building and subsystem in the *Reset Renewal Data* section.
iii. **Completed or Funded Projects.** If the project was completed or is funded, then the year of completion or funding will need to be entered in the *Actual Last* cell for that building and subsystem in the *Reset Renewal Data* section.

Step #3: Update Infrastructure by clicking *Next Step* or *Data Updates>Update Infrastructure*

In the infrastructure section all you need to update are the units. Click the edit button, and then enter the number of units for the sub-system within infrastructure. Please be sure to double check the unit of measure and if you have questions on the unit please contact Sightlines.



Step #4: Review Results

Click Next Step or *Data Updates>Review Results.* Run various charts using 2016 data to verify information and check for any obvious problems or outliers. Additional steps to qualify information before submitting data:

a. **Click *Benchmarks & Analytics>Capital Renewal Reports>* and run the 3 reports:**
   i. *2.7 Buildings with Renewal Date Problems* – see which subsystems have a predicted renewal date in the past
   ii. *10.4 Overall Summary by Campus* – determine any major changes from previous year
   iii. *3.1 Premature Backlog* – see which subsystems are in backlog well before the end of their standard useful life
b. Please fix any items listed on these reports. If you don't understand why something is on these reports, please contact Mike Bomhoff at Sightlines at mbomhoff@sightlines.com or 610-844-9642.

Step #5: Submit Profile

Click *Next Step* or *Data Updates>Submit Profile* and clicking *Submit Data.* This will temporarily lock your data for 2016. There will be a period of time that the System Office and Sightlines will review Submitted Data before accepting the data as final. Once the System Office and Sightlines accept the data, it is permanently locked for 2016. If you would like to have your data unlocked in the interim period between your initial Submittal and final acceptance, please contact Mike Bomhoff at Sightlines at mbomhoff@sightlines.com or 610-844-9642.

SYSTEM OFFICE HOUSEKEEPING

1. **Update the inflation costs**. The system applies the same annual inflation factor published by Minnesota Management & Budget for the Capital Budget Project Inflation schedule.

2. **Update the Year**. This administrative function is completed by Sightlines under guidance of the System Office. The year has been changed to 2016. The model will recalculate based on the new year and new cost assumptions. Recalculating may take as long as five minutes per campus.

3. **Reports!** The system office will be publishing system and campus specific reports and graphics after the 2016 data is complete.

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APPENDIX 1 - Report Definitions

2.1.2 All Buildings – Lists building name, number, type, location, GSF and usage percentages

2.4 All Building Profiles – Identifies key building and subsystem profiles by campus and by building.

2.7 Buildings with Renewal Date Problems – Lists buildings which have "next renewal dates" before (or in) the current year

3.1 Premature Backlog – Sub-systems that are listed in the backlog even though their age is less than 80% of their expected life cycle.

5.1.1 Backlog & 5 Year Renewal by Sub-System – Includes backlog and projected renewal needs for the next 5 years by building and sub-system.

5.5.1 Backlog & 10 Year Forecast By Sub-System – Includes backlog and projected renewal needs for the next 10 years by building and sub-system.

10.4 Overall Summary by Campus – GSF, CRV, Backlog, Average Annual Renewal, Average Annual Infrastructure Needs, FCI and Average Renewal divided by CRV

APPENDIX 2 – Building Type Definitions

Small: buildings less than 10,000 gsf with basic utility systems.

Examples include modular buildings. The HVAC systems, electrical and plumbing systems are designed to support basic teaching and office space. Also included in Small are Agricultural Facilities with basic utility systems such as greenhouses, headhouses, simple animal holding facilities, and storage facilities. (See note below.)

Simple: for buildings over 10,000 gsf with minimal systems.

Examples include warehouses, barns, shops and parking structures.

Basic: for buildings over 10,000 gsf with basic utility systems.

Examples of this type of building include classrooms, offices, and libraries. The HVAC systems, electrical and plumbing systems are designed to support basic teaching and office space. Older laboratory buildings are frequently typed as basic because of the type of HVAC, electrical and plumbing systems installed in the buildings.

Complex: buildings over 10,000 gsf with complex utility systems.

Examples include biological and chemistry laboratories as well as other facilities with highly developed system needs. These buildings have complex HVAC systems (usually twice that of Basic) and extra-strength power and plumbing.

Residential: buildings that are used for housing. No square footage threshold.

Examples include residence halls and apartment buildings.