



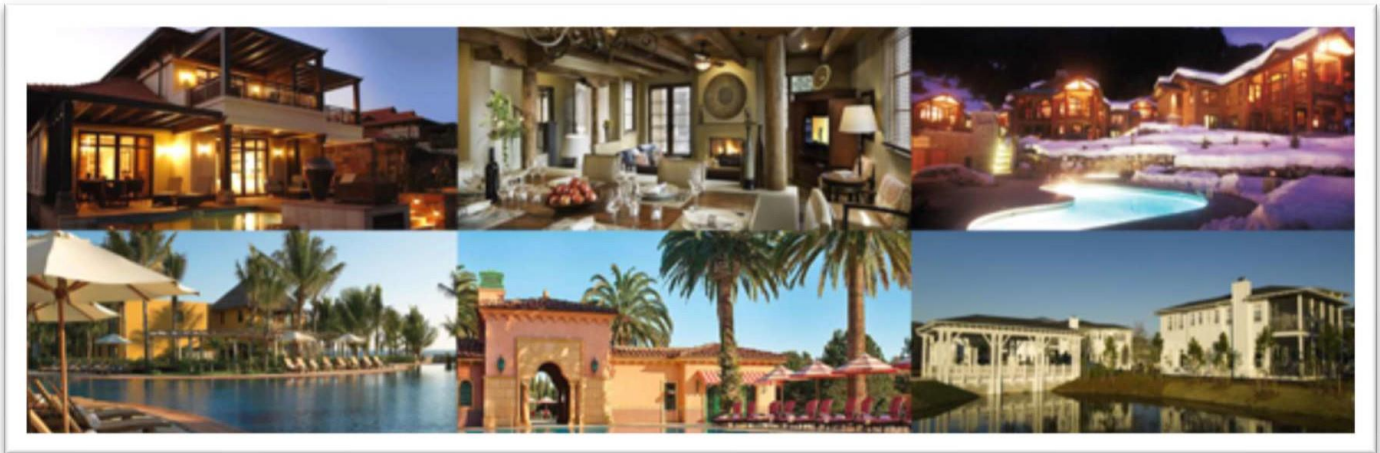
FACILITIES ADVISORS

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Reserve Studies – Maintenance Plans – Capital Budgets

FACILITIES ADVISORS IS UNIQUE in the services we offer, in our ability to meet the needs of our clients, and in our strong conceptual knowledge of capital budgeting processes. Our Facilities Advisors team possesses a broad set of skills that none of our competitors can match. Facilities Advisors has offices throughout the USA and we travel to the rest of the world.



RESERVE STUDIES are a specialized form of capital budget that are unique to the community association and timeshare industries. A more appropriate description is that the reserve study is a Major Repair and Replacement (MRR) study because it generally cannot include capital improvements. Reserve studies evolved in the 1980's as a hybrid service that is neither a capital expenditures budget nor a maintenance plan but is something that is a scaled down combination of the two that also contains a funding plan.

CAPITAL BUDGETS are used in all industries other than the association industry. While many use the terms capital budget and reserve study interchangeably, they are in fact quite different. The biggest differences are; (1) capital budgets include capital improvements, (2) capital budgets do not have the “built in” funding source common to reserve studies in the community association industry, (3) capital budgets do not include non-annual maintenance expenditures and reserve studies do, and (4) users of capital budget reports generally tend to be finance-oriented business managers who have the financial and maintenance backgrounds or knowledge to fully absorb the capital budget reports.

MAINTENANCE PLANS identify preventive maintenance procedures to maximize asset performance and reduce life cycle maintenance costs. The projected major expenditures in capital budgets and reserve studies are reduced when formal maintenance plans are implemented into the maintenance program. Both reserve studies and capital budgets are intended to be the financial reflection OF the maintenance program. Because most organizations don't have a formal maintenance plan, their maintenance programs are often inadequate. That's where Facilities Advisors comes in – we have the necessary Skills, Knowledge, and Experience (SKE) to help you create your formal maintenance plan. Having a maintenance plan and comprehensive maintenance program reduces overall “life cycle” maintenance costs, assures building safety, protects property investment value and often preserves the lifestyle intended in the original construction. A comprehensive maintenance program also increases the accuracy of the financial projections in the capital budget or reserve study.

FACILITIES ADVISORS – SKILLS, KNOWLEDGE AND EXPERIENCE

The team at Facilities Advisors are recognized leaders in the community association industry and the reserve study profession. Facilities Advisors CEO Gary Porter is a past national president of CAI and is also president of the International Capital Budgeting Institute (ICBI). We also wrote the book “Reserve Studies – The Complete Guide,” the most comprehensive book written on the topic of reserve studies.



We have the experience you need. Add to that our competitive fee structure and our easy-to-read reports, and you’ve got the right team for your reserve study. No matter the type of association, we’ve got the experience, and we can handle the job. Preparation of reserve studies and capital budgets requires that the preparers have training in several diverse disciplines and follow professional standards that provide Clarity, Consistency and Comparability. The professionals at Facilities Advisors are the only reserve preparers who can demonstrate knowledge in maintenance, valuation and finance. All Facilities Advisors team members either hold a credential in facilities maintenance or are enrolled in a maintenance credential program.

Professional standards - Facilities Advisors CEO Gary Porter is president of ICBI (International Capital Budgeting Institute) and primary author of ICBI’s Generally Accepted Reserve Study Standards. ICBI is a professional, independent standards-setting organization. ICBI’s standards are professional level standards based on sound underlying principles that compare very favorably to the standards others follow.

Component knowledge - Facilities Advisors CEO Gary Porter holds the FMP (Facilities Management Professional) credential issued by IFMA, the International Facilities Management Association of which he is a long-time member. His technical training is in facilities maintenance. This skill set is critical for understanding how to create maintenance plans and is the skill most directly applicable to evaluating physical components for reserve studies and capital budgets. Our east coast team member Lynn Sallee is a former general contractor. Together they have created a training course on high rise reserve studies. Our Arizona/Texas team member, Greg Libke has been with Facilities Advisors since 2018 and has prepared hundreds of reserve studies and is co-author with Gary Porter of the training course Country Club Reserve Studies. Greg is also president of ARP (Associated Reserve Planners), a trade organization for reserve professionals that provides educational services for the reserve study and capital budgeting professions.

Valuation knowledge - Facilities Advisors CEO Gary Porter is a recognized expert in valuations having testified in more than 50 court cases on valuation, pricing, and financial matters. He has even been appointed as the court’s independent expert on complex cases where the court was unable to “reconcile” opposing experts’ opinions. In addition, as a partner in a public adjusting company he negotiated insurance claims settlements for association clients. He is the author and presenter of the course “Cost Principles for Reserve Studies.” All Facilities Advisors team members have training in valuation principles.

Financial Knowledge - Facilities Advisors CEO Gary Porter is a CPA and THE expert on financial calculations, financial modeling, and financial reporting for reserve studies, the three aspects of financial knowledge critical to long-term budgets. All Facilities Advisors team members have training in these areas.

FACILITIES ADVISORS BENEFITS FOR YOU

Competitive fees – Our fees are competitive because of our extensive experience and dedication to using technology to make us more efficient. We are the only reserve study company to have developed on-site electronic data capture, which reduces the time necessary to gather component data and translate it into a reserve study report. We also "scope" the reserve study to determine the appropriate level of component detail and use software to do the "heavy lifting" This results in reports detailed enough to understand, but not so detailed that it overwhelms the reader.

Responsiveness - We are responsive to your needs. If you request changes to your report, we will make them, so long as the changes are within reasonable parameters. It is your report. We allow as many revisions as you need for a 30-day period after the draft report is issued.

Easy-to-read reports - Our reports conform to Generally Accepted Reserve Study Standards as issued by the International Capital Budgeting Institute and give you the information you need to (1) prepare your budget, (2) communicate summary information to your board of directors and members, and (3) meet statutory and regulatory disclosures.

Internet-based software - We provide you with access to the same internet-based software we used to prepare your reserve study. This allows you to keep your reserve plan up-to-date and save money in the future by (1) proactively planning reserve projects, and (2) minimizing future reserve study costs based on your update of component information.

Reports - We will provide a draft report for your review and approval and make any changes you request before issuing a final report. The report will be similar in format to the sample report on our website and will include a 30-year funding plan and percent funded disclosure by year. Supplemental schedules will include a component inventory with photos.

Software - A one-year annual software license to the Facilities 7 internet-based reserve study software is included at no additional charge. This is the same software that we use to prepare your reserve study. You may extend the license subject to a small annual license fee. We will provide instructions and reasonable training, which is normally conducted via web-based screen sharing software.

Reserve Studies for the Community Association and Timeshare Industries

The reserve study is a valuable long-term financial planning and budget tool that is based on an evaluation of the underlying physical assets combined with other "soft" costs related to the maintenance process. Since most associations do not have a formal maintenance plan upon which a budget can be created, the reserve study becomes a "hybrid" service that combines the physical analysis with the financial analysis. We must use the reserve study process to perform an on-site analysis to identify, quantify, and assess condition of all major assets (components) and make inquiries regarding maintenance and future planned expenditures in order to prepare a projection of future major repairs and replacements. Too many in the community association industry are under the impression that the reserve study is a maintenance plan, it is not. See our discussion of maintenance plans below to understand the difference between a reserve study and a maintenance plan.

The reserve study process differs significantly from the traditional "capital budgeting" process described below. Component cost data may come from a variety of sources; we will use your actual cost amounts where possible, refer to the prior reserve study, use our own proprietary database, or research costs of significant components from commercial sources. We inform you of any maintenance or safety issues noted during the site analysis. Any significant components identified that are not included in the funding study will be disclosed as "Excluded Components." We will consult with you in developing the funding plan in an attempt to adhere to your budget constraints, while still meeting your long-term funding goals.

We do **not** perform any construction or maintenance services that may conflict with the independence of our reserve study services. We will **not** perform any destructive testing as part of reserve study engagements. We will **not** retain any subcontractors as part of our reserve study engagements. Such activities are outside the scope of traditional reserve studies.

Capital Budgeting Services

The Capital Budget is a long-term financial projection based on a maintenance program. The on-site analysis for a capital budget generally differs significantly from an analysis performed for a community association reserve study because most of our non-HOA clients do have a strong maintenance program. Accordingly, our on-site analysis is usually limited to reviewing and testing the accuracy of our client's reports. We do perform spot checks and test quantities and measurements and evaluation of condition of physical components. There is often no need for us to identify, quantify, and assess condition of all major components because our clients often have qualified facilities maintenance staff who have already done this.

When we are hired for capital budgeting the primary things our clients seek from us are (1) strong capital budgeting conceptual knowledge, (2) data management skills (our largest capital budget contained more than 60,000 line item assets), (3) internet-based software that allows our clients to keep their budgeting system updated, and (4) financial reporting skills. We generally have two sets of primary contacts within the organization; (1) facilities maintenance staff and department heads for the physical analysis, and (2) financial and accounting staff for the financial analysis. Many times the financial and executive staff will include CPAs who are accustomed to the strict financial reporting protocols promulgated by the AICPA. Our reports are designed to meet their requirements and in general include the core financial projection reporting protocols established by the AICPA.

Maintenance Plan Services

There is much confusion, particularly within the community association industry regarding maintenance plans. Too many think that either a reserve study or a capital budget is a maintenance plan. Not correct, as these long-term budgets focus only on major repairs and replacements and ignore the operating level preventive maintenance activities that are so crucial to properly maintaining physical assets. Further most don't understand the difference between a maintenance plan and a maintenance program. Every organization has a maintenance program which consists of whatever activities you are or are not performing to maintain physical assets. A maintenance plan includes both operating level preventive maintenance activities and long-term major repairs and replacements.

A comprehensive maintenance plan implemented with a robust maintenance program promotes building safety, enhances property value, and supports the lifestyle the property was designed for. A good preventive maintenance program is cost effective - studies repeatedly demonstrate that effective preventive maintenance may initially result in slightly higher operating costs but over the long term those operating costs are more than offset by a reduction in major repair and replacement costs. Even the most conservative studies we have seen produced a cost savings of \$3 for every \$1 invested in preventive maintenance.

Our maintenance plan services include creating a checklist of recommended preventive maintenance procedures and inspections for each major physical component for which the organization has maintenance responsibility. For minor equipment and furniture items our general recommendation is simply to follow the manufacturer's recommended maintenance procedures. Our recommendations are formalized into a maintenance manual that includes checklists and time schedules. When you purchase a new vehicle you receive an owner's manual that gives you the recommended maintenance plan to keep your vehicle in peak condition and to reach its full expected life span. Our maintenance plan for your building and other facilities is intended for the same purpose – it's a guide to keep your property in peak condition, to reach full life expectancy, and TO RETAIN HIGH VALUE.

One of the biggest challenges in any organization is retaining information about maintenance activities. We refer to this as "institutional knowledge." The challenges arise because people change over time. Whether it is maintenance staff, managers, committee or board members, or management companies, people come and go. And when they go, their accumulated knowledge leaves with them. Another challenge is that all accounting systems are geared towards the annual financial reporting cycle. Accounting software products typically do not maintain multi-year records. Even if they do, there is no easy method to match dollar expenditures to specific assets.

What is needed is a tool to allow tracking of all maintenance procedures performed that is not required to be directly tied to dollar expenditures. We have developed an browser-based maintenance tracking software product to allow our clients to document all maintenance procedures performed. This software creates a maintenance profile and calendar, including regular inspections, for each major component, and has reporting for maintenance procedures completed, activities scheduled but not completed, and future scheduled maintenance activities. The information in these reports not only aids significantly in the reserve study and capital budgeting processes, but helps you reduce overall maintenance costs. Track maintenance activities is an investment, it is not a cost.

Levels of Service

Under ICBI reserve study standards, reserve professionals can perform either of two levels of service:

- **Independent Reserve Study** – The reserve professional performs an analysis and provides his opinion as the reserve study report. This is service level most people are used to. The limitation of this service level is that it usually involves minimal guidance or information from the association and the resulting report may not reflect the association’s planned maintenance activities or fit within their budget structure.
- **Reserve Management Plan (RMP)** – The RMP is a collaborative process between the reserve professional and the association. The advantage of this approach is that the association still receives the full benefit of the reserve professional’s Skill, Knowledge and Experience (SKE) but it is combined with the association’s actual maintenance experience and budget. At Facilities Advisors we prefer the reserve management plan level of service, which is exactly what it sounds like – we work with you to create a funding projection that reflects your planned maintenance activities.

Types of Engagements/Reports

Type 1 - Full Reserve Study with On-Site Analysis – We perform a complete on-site analysis, identifying and quantifying common area components. This also includes our component condition assessment and photo inventory of most components. We often include the Complete Measurements Report as part of this service.

Type 2 - Update of Reserve Study with On-Site Analysis – The on-site analysis is less comprehensive than a type 1 reserve study in that the identification and quantification of components is assumed to be the same as determined in a prior type 1 on-site analysis, unless it appears that there have been changes. The type 2 on-site analysis focuses on the component condition assessment and updates the photo inventory where necessary.

Type 3 - Update of Reserve Study without On-Site Analysis – An annual update to the reserve study is simply good planning. This allows you to "refresh" the funding plan and account for minor variations from the original funding plan. We inquire about expenditures made, changes in pricing of replacement costs, and variations in funding from the original plan, but do not perform an on-site analysis. This is a valuable planning tool at a very reasonable cost, generally no more than 25% of the cost of a full study.

Type 4 - Reserve Study Based on Architectural Plans – We read your plans to determine the components that will exist in the building(s) and inquire of the developer what interior nonstructural components are planned in producing the component list for the reserve study.

Electronic Tools used in the On-Site Analysis

Where possible, for many projects we can also offer our “**Complete Measurements Report**” which includes detailed schematic drawings that provide detailed, accurate measurements such as indicated below.

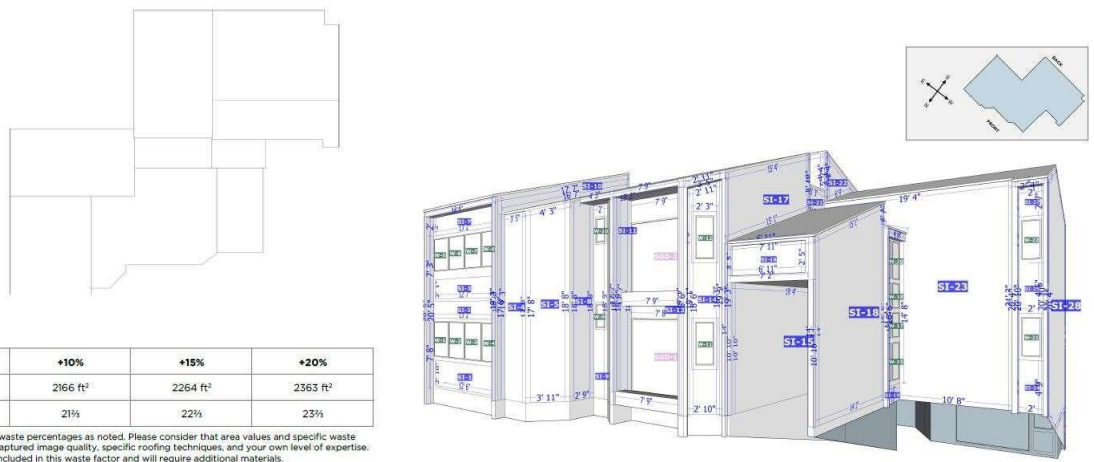
Roof	Area	Total	Length
Roof facets	1969 ft ²	9	-
Ridges / Hips	-	1	21' 11"
Valleys	-	0	-
Rakes	-	16	166' 9"
Eaves	-	18	191' 7"
Flashing	-	11	54' 1"
Step Flashing	-	15	86' 10"
Drip Edge/Perimeter	-	-	358' 4"

Roof Pitch	Area	Percentage
4/12	1849 ft ²	93.88%
0/12	71 ft ²	3.58%
3/12	50 ft ²	2.54%

Waste Factor Calculation

	Zero Waste	+5%	+10%	+15%	+20%
Area	1969 ft ²	2067 ft ²	2166 ft ²	2264 ft ²	2363 ft ²
Squares	20	21	21½	22½	23½

The table above provides the total roof area of a given property using waste percentages as noted. Please consider that area values and specific waste factors can be influenced by the size and complexity of the property, captured image quality, specific roofing techniques, and your own level of expertise. Additional square footage for Hip, Ridge, and Starter shingles are not included in this waste factor and will require additional materials.



Reduced size shown here – images are each full page size

The Reserve Study or Capital Budget Report

No matter how good the underlying site evaluation and compilation of component lists, that's not much help if it can't be translated into reports that are easy to understand. We constantly receive feedback from our clients that our reports are much easier to understand than any others they have seen. We follow the ICBI reporting standards, which guarantee uniformity of content, format, and calculations, or as ICBI says **Clarity, Consistency and Comparability**.

The key lies in understanding how people comprehend reports. Because long-term budget reports typically contain a 30- year financial projection and a large number of components, the data can be overwhelming. These are financial reports, and many people simply tune out because the data is confusing. We know that, so we make sure the data is presented in a manner that is easy to understand by following several key concepts.

Key 1 - Keep all summary financial exhibits limited to a single page – so concepts are easily communicated. We do that by presenting data at a category or location level, rather than at the component level. Our “official” reserve study report is presented at a category or location level and is typically limited to no more than 30 pages.

Key 2 - Including totals on all reports (most of our competitors reports do not include this simple step) so that a reader can see that the totals of data presented at the category level are the same as those presented at the component level and that reports agree to each other.

Key 3 - Present all component level reports as supplemental exhibits, not as part of the primary reserve study report. Those individuals who want just an overview are satisfied by the summary level report. Those individuals requiring more detailed data, particularly staff, will have access to the component level detail reports.

Please view the [sample report](#) on our website at www.FacilitiesAdvisors.com.

Industries Served



For condominium and homeowner associations, timeshare associations, and condo-hotels we are typically performing reserve study services rather than capital budgets due to their governing documents that prohibit capital improvements.

For all other types of organizations in the broad categories of for-profit, nonprofit and governmental entities we are typically performing capital budgeting services. Examples of such organizations are Country Clubs, Churches, Schools, Governmental agencies, and Hospitality industry. These organizations don't have the artificial limitation regarding capital improvements unique to the community association industry.

Maintenance plan services are provided for any type of organization that maintains physical facilities. Maintenance plans for governmental agencies adhere to the protocols recommended by GSA.

High rise condominium projects have complex mechanical systems that don't exist in other types of buildings. Geographic location plays an important part in determining building products used and maintenance of the buildings. For example, condo projects in snow country differ considerably from a desert location. “Large-scale” associations have their own unique characteristics, from gated entries and miles of roads to major amenities such as golf courses, lakes, dams, marinas, equestrian centers, campgrounds, and even shooting ranges and airports. Timeshare and other shared ownership associations require including unit FF&E inventory in the reserve study. Our Facilities 7 software allows us to compile individual unit inventory for each unit yet summarize it in such a manner that the reports are still very easy to read.



The Facilities Advisors Team - Facilities Advisors and our accomplished affiliate team includes professionals from varied disciplines, including reserve professionals, facilities management professional, general contractor, and CPA. No other reserve study company includes such a varied team to address all the skill sets required of a reserve professional. In addition, we adhere to the ICBI international reserve study standards, which are the most stringent standards applying to the reserve study industry. We use exclusively Facilities 7 reserve study software, which is certified to be in compliance with ICBI software standards. Using Facilities 7 software means we can provide you with information that no one else can provide, such as a complete component inventory by location, down to the level that we can show you every asset in a specific room. The Facilities 7 internet-based software is made available to you and provides you with a dynamic management tool, not a static "once every three years" paper report.

No matter if your goal with the reserve study is just to meet statutory requirements, get a budget for next year, or to create a long-range capital budget plan, we can work with you to achieve your goals. We really shine when we are facing tough reserve studies from the most demanding of our clients. The skill set involved in our experience and the below-listed designations represent the skills most directly applicable to evaluation of existing facilities, preparation of a reserve study or capital budget, and advising the association on maintenance matters.



Gary Porter, RS, CPA, FMP, RRC, RSS - CEO of [Facilities Advisors](#)

Primary Areas Served: Nevada, California, Hawaii
(702) 605-2394 gporter@facilitiesadvisors.com

Facilities Advisors CEO Gary Porter has provided financial services to condominium and homeowners associations since 1976. He has authored five books and more than 400 articles on association financial matters and has made hundreds of presentations to industry groups. He is recognized as one of the foremost financial experts for associations and has been quoted or published in the Wall Street Journal, Kiplinger's Personal Finance, Common Ground, The Ledger Quarterly, and The Practical Accountant. He has been performing reserve studies since 1982. He is also president of the International Capital Budgeting Institute (ICBI) and primary author of ICBI's Generally Accepted Reserve Study Standards (www.capitalbudgeting.org).

Mr. Porter holds the FMP (Facilities Management Professional) credential, which designates him as an expert in facilities management, the most critical skill in component condition assessment. He was a recognized economics and valuations expert in the California Superior Court system for more than twenty years and occasionally served as the court appointed independent expert. He holds CAI's RS (Reserve Specialist) designation and is also a Reserve Study Specialist (RSS) in Nevada. Mr. Porter is also a Certified Public Accountant and possesses the skills directly applicable to preparation of a financial projection for future major repairs and replacements. He also holds the Registered Reserve Consultant (RRC) credential, the highest designation available to reserve preparers. The RRC credential requires that the individual must have completed a set of training courses that include all technical areas of the reserve study process. Mr. Porter is the author of several of the required training courses and a consultant or reviewer on all of the required courses. His broad background gives him the global perspective of the entire reserve study process that most others lack, and the ability to write the book "Reserve Studies – The Complete Guide". Mr. Porter has been active in the industry for decades. He was a founding member of the CAI Channel Islands California chapter in 1979 and served as CAI's national president in 1998-99. He has received numerous awards, including CAI's Distinguished Service and Author of the Year Awards, and CACM's Vision Award for outstanding service.



Greg Libke, RSS of [Facilities Advisors Arizona, Texas & the Midwest](#)

Primary Areas Served: Arizona, Texas, the Midwest
(602) 698-0905 glibke@facilitiesadvisors.com

Greg Libke is the Facilities Advisors reserve professional for Arizona, Texas and the Midwest. He also serves as President of Associated Reserve Planners USA, a trade organization for reserve professionals, and also serves as a Director of ICBI (International Capital Budgeting Institute). Greg is currently based in Chandler, Arizona and serves Arizona, Texas, and the Midwest. After earning a degree in Business Management, and working with local companies in Arizona, Greg has acquired the skills and knowledge to deliver comprehensive reserve studies to his clients. Greg has considerable experience with planned developments and condominium associations throughout the country. He has also prepared capital budgets for country clubs.



Lynn Sallee, RS, PRS, CPSI, CMM of [Facilities Advisors East Coast](#)

Primary Areas Served: East Coast Regional
(508) 630-4902 lsallee@facilitiesadvisors.com

Facilities Advisors Reserve Specialist, Lynn Sallee, has been in commercial and residential construction, development, management, and financing since 1974. His background is unique with lengthy periods of experience on both sides of the property table as a producer and as planner/financier. This professional blend of business background coupled with four years community and HOA property management provides experience and insights invaluable in his reserve study inspections and finished reports. Mr. Sallee holds the RS designation from Community Associations Institute (CAI) and the PRA designation from the Association Professional Reserve Analysts (APRA), the Certified Playground Safety Inspector (CPSI), Certified Maintenance Manager (CMM) and Project Engineering designation from the Bahamian Government. His reserve study experience encompasses all types of reserve studies, including condominium and homeowners' associations, and mid-rise and mixed-use high-rise properties in excess of 1.5 Mil square feet.



Robbie Pepper, RS, RSS, CMM of [Facilities Advisors Rocky Mountain](#)

Primary Areas Served: Colorado, New Mexico, Utah
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Robbie has performed hundreds of reserve studies in Colorado working with reserve study challenges specific to Colorado's climate. The similarity in construction types and materials is very similar between Colorado, Utah, and New Mexico. Robbie's earned professional designations include Reserve Specialist (RS) from CAI, Reserve Study Specialist (RSS) from the State of Nevada, Certified Manager of Community Associations (CMCA), Certified Commercial Investment Manager (CCIM), and Certified Maintenance Manager (CMM) as well as many other real estate designations designed to provide superior service to you. Robbie's work in producing reserve studies for hundreds of community associations include residential areas, condos, townhomes, recreation centers, high rises, water districts, and others.



Jay Grant of [Facilities Advisors Northwest](#)

Primary Areas Served: Washington, Oregon, Idaho
(206) 260-0080 jgrant@facilitiesadvisors.com

Jay B. Grant is a risk analyst providing reserve report studies. He has extensive organizational, financial, maintenance and structural project knowledge about condominiums which includes interfacing with local government for projects & permits. He holds a professional risk underwriter designation in financial services from Northeastern University. His personal condominium experience includes living in an Edmonds condo, serving the HOA president for several years, and managing multiple projects from structural, roof and major repairs.

His professional experience includes serving as a senior advisor at the state and federal level, including positions managing national and international security, mass and critical environment risk management, security and counterterrorism, evidenced based programs and best practices. He also has extensive experience in authoring legislation, model law, regulatory rule making, complex negotiation and collaborative requirements.

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To request a quote, e-mail your information and inquiry to info@facilitiesadvisors.com or fill in our short form by visiting us at <https://facilitiesadvisors.com/rfp-bid-request>.

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