

Beyond punch lists - the asset management point of view in completing and handing off

For a new building or large scale renovation the end of the interval after substantial completion up to putting away the punch lists was once marked by inheriting of drawers and shelves of drawings, manuals, receipts, equipment warranties, sub-contractor contacts for service and warranties, and notes jotted down while walking around with the contractor(s). That doesn't happen anymore in the building information and computer maintenance management systems era, right? At least, it is no longer the default. Contracts specify better. Our expectations now include commissioning, where documentation will be complete and current in electronic form with building and equipment settings known and performance verified. But what has to happen to make turnover complete and valid so that the building will perform with use and maintenance?

Whether or not you have been involved during the time when a project gives way to occupant use, you have probably been persuaded that there is no substitute for FM involvement from concept forward to obtain best performance and value over the facility life cycle. Even a relatively small project without extraordinary features and systems now generates a great deal of information of value to obtain best satisfaction and economic performance in operations and maintenance. A complete collection of technical and administrative procedures for turnover is not obvious, but within reach given a well-founded process to define, create, organize, and complete with confidence the full scope of procedures and benchmark results. The way is hands-on, detailed, and systematic. FMCC member Doug Litwiller of Building Maintenance Optimization Consultants, BMOC, has written such a guide, following up on consulting experience with Purdue University. *Optimizing New Building Turn Over via the "TOW" Process* will be published as a chapter of *Operational Guidelines for Educational Facilities: Maintenance; 3rd Edition* (APPA, Ted Weidner, ed. expected Q1 2021.) I had the opportunity to review a draft of the chapter and offer a brief review with an eye toward benchmarking as O&M moves toward steady and repeatable.

TOW abbreviates turnover memorably as Turn Over Work group. TOW is a process aligned with *ANSI/APPA 1000-1 Total Cost of Ownership for Facilities Asset Management (TCO) – Part 1: Key Principles*. The TOW role and functions are present from project concept forward, marking the start of the building lifecycle. TOW will already be well involved by the time that construction fades into operations, forwarding the lifecycle continuum. TOW participants are never idle watch dogs. They help assure all along that stakeholder interests are recognized, communications shared and that means to monitor and manage, such as CMMS, are present and configured. TOW presence is formally part of the project, not a spectator but a continuity function alongside construction roles that will *not* continue after turnover. TOW is a formation point for integration, a hub for set up, training, warranty and maintenance agreements, emergency preparedness, safety, waste & environmental, security, and others. TOW minds and shapes testing and commissioning workflows and informs the new O&M budget. The role of TOW is, in summary, a process layer above procedures, punch lists, and turnovers, coordinating and communicating to reduce mishaps and incompletions, leading to economy and stakeholder satisfaction all around.

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