

From Assessment to Execution

OPTIMIZING THE CAPITAL PLANNING PROCESS

GLENN ADAMS, ASSETWORKS, PRODUCT MANAGER

The Big Picture



ASSESSMENT

HOW MANY
ROOFS
BELONG ON
YOUR
CAPITAL
PLAN?

ALL OF
THEM

ASSESSMENT

WHY CREATE
A

NEEDS
LIBRARY?

CREDIBLE
DATA

ASSESSMENT

WHAT ARE 4
COMMON
THINGS I
MAY DO TO
A ROOF?

1. PREVENTIVE
MAINTENANCE
2. CORRECTIVE
MAINTENANCE
3. RENOVATE/ALTERATE
4. REPLACEMENT

NEEDS LIBRARY



NEEDS LIBRARY

WHAT DO I
NEED TO
KNOW?

1. WHAT?
2. WHERE?
3. WHEN?
4. HOW MUCH?
5. URGENCY?
6. WHY?

URGENCY



CRITICALNESS VS. CRITICALITY

CRITICALNESS VS. CRITICALITY

CRITICALNESS

CRITICALITY

HOW IMPORTANT IN THE HIERARCHY

HOW IMPORTANT IN THE HIERARCHY

LIKELIHOOD OF FAILURE

ANSWER THE QUESTION WHY

1. RELIABILITY
2. ASSET PRESERVATION
3. PROGRAM IMPROVEMENT
4. SAFETY/CODE
5. ECONOMIC OPPORTUNITY
6. NEW CONSTRUCTION

PRIORITIZED LIST

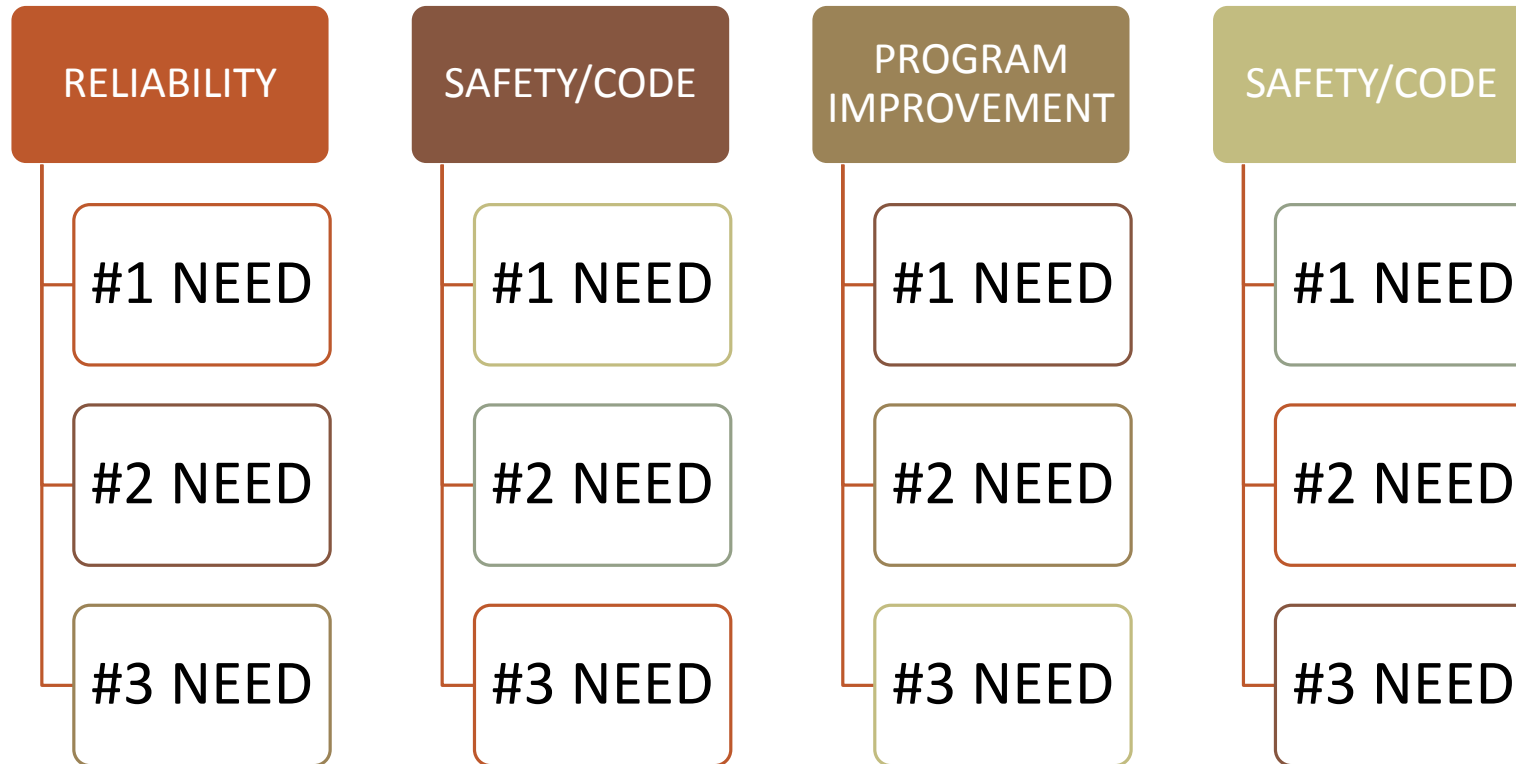
POTENTIAL PROJECTS

#1 NEED (RELIABILITY)

#2 NEED (PROGRAM IMPROVEMENT)

#3 NEED (SAFETY/CODE)

PLANNING GROUP (WHY)



The Big Picture



STRATEGIC PLAN

PLANNING
GROUP

PROPERTY
PORTFOLIO

PLANNING GROUP

ANSWER THE QUESTION WHY

PROPERTY PORTFOLIO

GROUP LIKE PROPERTIES

THINK STRATEGICALLY

The Big Picture



TELL A

STORY

JMU Core Qualities and Goals

1. Academic Qualities: Outstanding Programs
2. Academic Qualities: Teaching, Scholarship, and Research Excellence
3. Access, Inclusion, and Diversity
4. A Culture of Philanthropy