Facilities Management System *PlanAhead*©

A method of organizing information for multiple Buildings about costs of maintenance and capital Expenditures for as many years forward as you wish.

The data can be manipulated and reported out in a Myriad of ways to suit **budgeting** requirements, **Management** requirements and **scheduling** requirements.

What it does

Organizes information for

- •Exterior
- •Interior
- •Systems (plumbing, electrical, mechanical),
- •Landscape
- •Keeping track of their condition
- •And cost of repair or maintenance.

Keeps track of costs of maintenance forever. (Inflation can be figured each year)

Reports out projected costs

- •Over time
- •By component
- •By building

How it works

- •Uses a commercial database to log in information
- •Calculates costs of repair or maintenance
- •Summarizes costs any way you want
- •Updates to information are done any time
- •Electronic reports mean less paperwork
- •Paper reports can be printed out any time

Why it is valuable

•Easy to use

•In house personnel can operate it and change it to suit

•Inexpensive

•Easily changed and adapted for your application











Operation

Data is input into a database in a form created And customized for the organization.

Forms can be easily modified, added to, and Rearranged "on the fly", at any time.





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Preservation Society of Newport County Facilities Management Program

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Find <2031 Find All But Replicate



Report Selector



The report selector Is a group of predefined Scripts that finds, sorts And displays informatior In different ways.



A report for one building can be displayed. For example, the Elms repairs for the Next ten Years is displayed.

401 Elms Masonry & Roof





- Exterior Restoration \$1,057,468
- Masonry Sidewalls
- Roof Needs Replacement
- Upper Flat Roof
- Lower Roof Replacement
- Garden Fountains and Wall





Preservation Society of Newport County Navigate Box Memu Find Rept Cabe SList Geneticities Management Program © McGinky Hard & Associates LLP 1999 © McGinky Hard & Associates LLP 1999 Provide State Report by Year - House - CSI Edd Sched © McGinky Hard & Associates LLP 1999 Privativ Peikkag CEI Extensit Cont Total 10,000 CSI Gray 0700 Extensit Cont Total 19,000 CSI Gray 0700 Extensit Cont Total 19,000 CSI Gray 0700 Extensit Cont State 19,000 Extensit Cont State 19,000 Next 401 Hase Building Yee Eachedula 1999 Extensit Cont State 19,000 Next 401 Hase Building Yee Eachedula 1999 Extensit Cont State 19,000 Next 401 Hase Building Yee Eachedula 1999 Extensit Cont State 19,000 Next 401 Hase Building Yee Eachedula 2000 Extensit Cont State 19,000 Next 401 Hase Building Yee Eachedula 2000 Extensit Cont State 19,000									
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This report shows By year, then by CSI, all the work that should be Done over the Next ten years.

(For one Building (Elms) in this case).

And Totals the work By year and all years

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.	Preserva	ution Society of I	Newport County	
Navigat	e Box Facil	ities Manageme	nt Program	
Menu Fin Page Lis Calc S.L Mods Site Bldg Sch	d Rept t Sel .ist e med	t by House	© McGinley Hart & Associates Li e - Overview	LP 1999
FF10F1KY D411	ang	Report	y nouse - Dean - Report o	Overview of
Building	101 Breakers Main Building	Estimated Cost Sum	4,516,167	
Building	140 Breakers Children's Cottage	Estimated Cost Sum	185,862	All buildings
Building	150 Breakers Stables	Estimated Cost Sum	400,320	With Estimated
Building	160 Breakers Caretakers Cottage -	Estimated Cost Sum	129,773	
Building	170 Breakers Caretakers Cottage -	Estimated Cost Sum	150,061	—— Costs for all
Building	180 Breakers No. 1 Greenhouse Main	Estimated Cost Sum	263,953	
Building	181 Breakers No.1 Greenhouse B Mid	Estimated Cost Sum	13,650	repairs
Building	182 Breakers No.1 Greenhouse No 2	Estimated Cost Sum	41,600	
Building	183 Breakers No.1 Greenhouse Shed 1	Estimated Cost Sum	8,640	
Building	184 Breakers No.1 Greenhouse Shed 2	Estimated Cost Sum	2,520	Each building
Building Bailding	201 Chateau-Sur-Fier	Estimated Cost Sun	54 557	Each building
Building	250 Chateau-Sur-Mer Tea Youse	Estimated Cost Sun	28.080	Is totaled by
Building	270 Chateau-Sur-Mer Brownstone Gate	Estimated Cost Sum	10,800	
Building	275 Chateau-Sur-Mer Moon Gate	Estimated Cost Sum	504	year
Building	301 Chepstow	Estimated Cost Sum	494,218	
Building	320 Chepstow Caretaker's Cottage	Estimated Cost Sum	152,352	
Building	401 Elms Main Building	Estimated Cost Sum	1,986,512	
Building	420 Elms Carriage House (West)	Estimated Cost Sum	298,440	Dereert
Building	501 Green Animals Main Building	Estimated Cost Sum	172,484	keport
Building	502 Green Animals Barn	Estimated Cost Sum	81,180	Continued
Building	503 Green Animals Caretaker's	Estimated Cost Sum	41,256	20
Building	504 Green Animals Gift Shop	Estimated Cost Sum	38,235	

Building	505 Green Animals Greenhouse	Estimated Cost Sum	23,240	
Building	601 Hunter House	Estimated Cost Sum	101,760	
Building	701 Isaac Bell Nouse	Estimated Cost Sum	248,798	
Building	801 Kingscote Main Building	Estimated Cost Sum	382,681	
Building	840 Kingscote Stables	Estimated Cost Sum	23,832	
Building	901 Marble House	Estimated Cost Sum	618,134	
Building	940 Marble House Chinese Tea House	Estimated Cost Sum	42,480	
Building	1001 Rosecliff	Estimated Cost Sum	459,902	
Building	1101 Preservation Society N.Q.	Estimated Cost Sum	207,669	
Building	1301 Murray Place No. 1 Greenhouse	Estimated Cost Sum	5,184	
Building	1302 Murray Place No. 2 Greenhouse	Estimated Cost Sum	5,184	
Building	1303 Murray Place No. 3 Greenhouse	Estimated Cost Sum	5,184	
Building	1304 Murray Place Garage	Estimated Cost Sum	25,344	
Building	1305 Murray Place Storage Place	Estimated Cost Sum	58,086	
Building	1306 Murray Place Garden Cottage	Estimated Cost Sum	30,390	
Building	1601 Warehouse	Estimated Cost Sum	142,992	
•				
		Grand Trailing Sum	14,323,609	

(Continued). Overview of All buildings With Estimated Costs With Bottom line. Information can be sent to a summary Database for management analysis and Decision making for future work.

In the following examples the next five Years are examined for major projects.

PRESERVATION SOCIETY OF NEWPORT COUNTY MAJOR REPAIRS- YEAR/BUILDING

	Building Name	<u>Project</u> Specific	<u>Project</u> Description	Amount	<u>Year</u> Scheduled	
•	Breakers Caretakers	Gutters/Flashing		35,000	2001	
	Breakers Caretak	(ers	Amount Summed	35,000	-	
•	Breakers Main Building	Roof/Masonry Wal	I	987,603	2001	
0	Breakers Main Building	Elevator		57,600	2001	
0	Breakers Main Building	Electrical	Eliminate Sub Panels	27,000	2001	
	Breakers Main Bu	uilding	Amount Summed	1,072,203	-	
0	Chateau-Sur- Mer	Electrical	Upgrades/transf ormer	43,800	2001	\leq
•	Chateau-Sur- Mer	Heating		50,400	2001	
•	Chateau-Sur- Mer	Plumbing		41,760	2001	
	Chateau-Sur-Mer		Amount Summed	135,960	-	
•	Chepstow	Porch Brackets/Trellis		25,000	2001	
	Chepstow		Amount Summed	25,000	-	k
0	Elms Stables (East)	Electrical		40,000	2001	1
0	Elms Stables (East)	Plumbing		40,000	2001	
	Elms Stables (Ea	st)	Amount Summed	80,000	-	
•	Elms Sunken Gardens	Tortoise Fountain	Masonry, Bronze,	900,000	2001	
	Elms Sunken Gar	dens	Amount Summed	900,000	-	
•	Marble House	Masonry	(drive way balustrade	136,800	2001	
•	Marble House	Generator	(re-location of transformer)	45,000	2001	
	Marble House		Amount Summed	181,800	-	
•	Marble House Chinese Tea	Restoration Propo	sal (in-depth study /repair	20,000	2001	
	Marble House Ch	inese	Amount Summed	20.000	-	

PRESERVATION SOCIETY OF NEWPORT COUNTY MAJOR REPAIRS- YEAR/BUILDING

	<u>Preserva</u> M	AJOR REPAIRS- YE	AR/BUILDING			
	<u>Building Name</u> Rosecliff	<u>Project</u> Specific	Project Description Amount Summed	Amount 30,000	<u>Year</u> Scheduled	
•	Warehouse	Roof		95,000	2001	
•	Warehouse	Ventilation		10,000	2001	(Continued)
•	Warehouse	Climate Control Storage		30,000	2001	By year for each
	Warehouse		Amount Summed	135,000	2001	Dy year for each Duilding with
•	Breakers Main Building	Roof/Masonry Wall	(w/Architectura Fees)	1,015,886	20	Building with
•	Breakers Main Building	Ornamental Iron		93,600	2002	Detail line items
•	Breakers Main Building	Masonry		64,800	2002	
	Breakers Main Bu	ilding	Amount Summed	1,174,286		
•	Chateau-Sur- Mer	Electrical		25,000	2002	
	Chateau-Sur-Mer		Amount Summed	25,000		
•	Elms Main Building	Masonry	Clean/repoint	642,468	2002	
•	Elms Main Building	Masonry	Property Wall	30,000	2002	
•	Elms Main Building	Electrical		25,000	2002	(Continued for
	Elms Main Buildin	Ig	Amount Summed	697,468		(Continued for
•	Marble House	Elevator		79,200	2002	All five years,
	Marble House		Amount Summed	79,200		But not shown)
•	Marble House Chinese Tea	Restoration		150,000	2002	
	Marble House Ch	inese	Amount Summed	150,000		
•	Rosecliff	Masonry	Retaining Wall	115,200	2002	~~24
	Rosecliff		Amount Summed	115,200		

PRESERVATION SOCIETY OF NEWPORT COUNTY MAJOR REPAIRS - BUILDING SUMMARY

<u>Building Name</u>

ltems	55	Amount Summed Total	9,267,077		
1601	Warehouse		135,000		
1001	Rosecliff		295,200		
940	Marble House Chine	se Tea	170,000		
901	Marble House		472,000		
801	Kingscote Main Buil	ding	97,400		
440	Elms Sunken Garder	าร	900,000		
430	Elms Stables (East)		203,600		5
401	Elms Main Building		1,057,468	Five vebr	
301	Chepstow		184,000	For the ne	V
201	Chateau-Sur-Mer		901,520	Each build	dine
170	Breakers Caretakers	Cottage -	35,000		1
101	Breakers Main Buildi	ng	4,815,889		4

Þ.

PRESERVATION SOCIETY OF NEWPORT COUNTY MAJOR REPAIRS- YEAR SUMMED

The same information for the next five years Can be displayed in a number of ways for Planning and management purposes

PRESERVATION SOCIETY OF NEWPORT COUNTY MAJOR REPAIRS - BUILDING

		Building Name	<u>Project</u> Specific	<u>Project</u> Description	Amount	Year Scheduled	
•	101	Breakers Main Building	East Terrace	w/Architectur al Fees	1,500,000	2005	
•	101	Breakers Main Building	Electrical	Eliminate Sub Panels	27,000	2001	
•	101	Breakers Main Building	Elevator		57,600	2001	
•	101	Breakers Main Building	Masonry		64,800	2002	
•	101	Breakers Main Building	Masonry		64,800	2003	
•	101	Breakers Main Building	Masonry		136,800	2004	
•	101	Breakers Main Building	Masonry		64,800	2005	by I
•	101	Breakers Main Building	Ornamental Iron		93,600	2002	Deta
•	101	Breakers Main Building	Ornamental Iron		93,600	2003	Sort
•	101	Breakers Main Building	Ornamental Iron	×	93,600	20	5010
•	101	Breakers Main Building	Roof/Masonry Wa	all	987,603	2001	>
•	101	Breakers Main Building	Roof/Masonry Wa	all (w/Architectu ral Fees)	1,015,886	2002	
•	101	Breakers Main Building	Roof/Masonry Wa	all (w/Architectu ral Fees)	615,800	2003	
	Break	ers Main Building) An	ount Summed	4,815,889		
•	170	Breakers Caretakers	Gutters/Flashing		35,000	2001	V
	Break	ers Caretakers C	ottage - An	ount Summed	35,000		
•	201	Chateau-Sur- Mer	Chimneys		74,000	2004	
•	201	Chateau-Sur- Mer	Electrical	Upgrades/tran stormer	43,800	2001	
•	201	Chateau-Sur- Mer	Electrical		25,000	2002	
•	201	Chateau-Sur- Mer	Electrical		25,000	2003	
\circ	201	Chateau-Sur-	Electrical	Caretaker	35,600	2004	

	PRESER	VATION SOCIETY OF N	EWPORT COUN	<u>TY</u>		
	Preview	MAJOR REPAIRS - PI	ROJECT			
	Building Name	<u>Project</u> Specific	<u>Project</u> Description	Amount	<u>Yea</u> Scheduled	<u>r</u>
•	Chateau-Sur- Mer	Chimneys	- •	74,000	2004	4
		Chimneys		74,000	Amount	Summed
•	Warehouse	Climate Control Storage		30,000	2001	
		Climate Control Sto	rage	30,000	Amount	Summed
•	Breakers Main Building	East Terrace	w/Architectur al Fees	1,500,000	2005	
		East Terrace		1,500,000	Amount	Summed
•	Breakers Main Building	Electrical	Eliminate Sub Panels	27,000	2001	
•	Chateau-Sur- Mer	Electrical	Upgrades/tran stormer	43,800	2001	
•	Elms Stables (East)	Electrical		40,000	2001	
•	Chateau-Sur- Mer	Electrical		25,000	2002	SC
•	Elms Main Building	Electrical		25,000	2002	b
•	Chateau-Sur- Mer	Electrical		25,000	2003	\rightarrow \lor
•	Chateau-Sur- Mer	Electrical	Caretaker Floor	35,600	2004	
•	Marble House	Electrical		25,000	2004	
		Electrical		246,400	Amount	Summed
•	Breakers Main Building	Elevator		57,600	2001	
•	Marble House	Elevator	×.	79,200	2002	
•	Chateau-Sur- Mer	Elevator		45,000	2003	
•	Chepstow	Elevator		64,000	2005	
		Elevator		245,800	Amount	Summed
•	Rosecliff	Exterior Lighting	Parking Lot Lamps	30,000	2001	

	PRESERVA	TION SOCIETY OF N	EWPORT COUNTY	Na	me (Project) (Amount)	nd (Year)
		MAJOR REPAIRS- AN	IOUNT	(Name S)	ummed (Home) Total	(Year Sum)
	Building Name	Project Specific	<u>Project</u> Description	Amount	Year Scheduled	<u>(</u>
•	Breakers Main Building	East Terrace	w/Architectur al Fees	1,500,000	2005	
•	Breakers Main Building	Roof/Masonry Wall	(w/Architectu ral Fees)	1,015,886	2002	
•	Breakers Main Building	Roof/Masonry Wall		987,603	2001	
•	Elms Sunken Gardens	Tortoise Fountain	Masonry, Bronze,	900,000	2001	
•	Elms Main Building	Masonry	Clean/repoint	642,468	2002	
•	Breakers Main Building	Roof/Masonry Wall	(w/Architectu ral Fees)	615,800	2003	Pu amount of
•	Chateau-Sur- Mer	Roof		429,960	2004	By amount of
•	Elms Main Building	Masonry	Retaining Wall & Property	180,000	2004	Project in
•	Marble House Chinese Tea	Restoration		150,000	2002	Descending
•	Marble House	Terrace		150,000	2003	Descending
•	Rosecliff	Terrace		150,000	2004	order
•	Marble House	Masonry	(driveway balustrade	136,800	2001	
•	Breakers Main Building	Masonry		136,800	2004	
•	Rosecliff	Masonry	Retaining Wall	115,200	2002	
•	Elms Main Building	Masonry	Field Stone & Property Wall	115,200	2005	
•	Kingscote Main Building	Painting	Main & Stables	97,400	2005	
•	Chateau-Sur- Mer	Windows		95,000	2004	
•	Chepstow	Masonry	Property Wall	95,000	2005	
•	Warehouse	Roof		95,000	2001	
•	Breakers Main Building	Ornamental Iron		93,600	2002	30

Project Project Year Building Name Specific Description Amount Scheduled Breakers Roof/Masonry Wall 987,603 2001	
Breakers Roof/Masonry Wall 987,603 2001	1
Main Building	
 Breakers Roof/Masonry Wall (w/Architectura 1,015,886 2002 Main Building 	
 Breakers Broof/Masonry Wall (w/Architectura 615,800 20 This screen state 	shows
 Elms Stables Roof (East) 48,600 2003 Roofing proj 	ects
Chateau-Sur- Roof 429,960 20 00 V	$\langle \rangle$
Chepstow Roof 113,400 2006	\square
Kingscote Roof Flat 34,301 2006 Stables	
Warehouse Roof 95,000 2001	
Items 8 Amount Summed Total 3 340 550	

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Things Fall Apart

VOL CCXXXV NO. 98 EE/CP ***

OWJONES

Properties manager Curt Genga and CEO Trudy Coxe of the Preservation Society of Newport County have learned that the 33 buildings they oversee will require \$100 million over the next 30 years. Here, they inspect a lead drain atop the Elms.

Newport Historic Society Is Swamped With Repairs

BV JEFFREY KRASNER

Staff Reporter of THE WALL STREET JOURNAL NEWPORT, R.I.-On the attic walls of

the Breakers, the 70-room Italian Renaissance mansion that Cornelius Vanderbilt II built in 1895 as a family summer home, are scribbled the dirty little secrets of this grand edifice. There are dates "Sept. 29-55," "5/26/61," "11/3/66-bad" in different spots on the walls.

They record not a series of illicit trysts, but when the water came in. That's right. the roof of America's best-known monument to Victorian excess leaks. And it has continued to leak long after Mr. Vanderbilt's descendants stopped marking the dates on the terra-cotta blocks.

The Breakers isn't the only historic site in Newport with problems. The Preservation Society of Newport, which owns and operates 10 other historic homes, has just learned that all 33 buildings it oversees are in need of extensive repairs. And that will force the society to come up with a lot of money-\$100 million over the next 30 years to preserve their roofs and exteriors. While the number is "scary," says Trudy Coxe, the society's chief executive officer, it gave the organization a needed wake-up call. "I see it as an eye-opener," she says.

The mansions are remnants of Newport's golden age in the late 19th and early 20th centuries, when industrial barons commissioned the monumental summer cottages. Over the years, as the owners' families scattered or their wealth was disbursed, some properties fell into disrepair.

The society, founded in 1945, is a nonprofit organization devoted to acquiring and preserving the mansions. Today, the mansions are the single biggest tourist draw for Newport, which draws 3.5 million visitors a year, according to Bob Rosenberg, director of the Newport Convention and Visitors Bureau. In 1999, 865,312 people visited the society's mansions.

So how did the preservation society discover the extent of the repairs?

The society used to keep track of just the 10 to 12 active maintenance projects going at any one time, says Curt Genga, the society's properties director. But there was no way to anticipate problems that might arise five years hence. And small catastrophes, like the electrical fires that break out Please Turn to Page NE3. Column 1

THE WALL STREET JOURNAL/NEW ENGLAND

Mansion Repairs Are Swamping **Preservation Society**

Continued From Page NE1 once or twice every year, always seemed to push back certain projects.

Then two years ago, the society heard about McGinley Hart & Associates LLP, a Boston consulting firm that was working for the Big Dig, the \$13.6 billion project to bury a highway underneath downtown Boston. McGinley Hart was hired to track how the Big Dig would affect historic structures along the route and predict maintenance the buildings might need as the project plowed through town. "We need something like that," Mr. Genga recalls saying.

So the society, working with McGinley Hart, conducted a comprehensive, \$200,000 survey of all the buildings and their exterior maintenance needs. The result was a giant to-do list of repairs.

Really, it's a database that is a combination of a to-do list and an electronic calendar, reminding the society when certain things need to by one. Punch up record number 1271 and y rn that most of the original brass was ition pipes in Chateau-Sur-Mer, a home, are starting to fail. recommends that all brass placed or equipped with shutof tal cost: \$41,760. If the project isn ter a year, the computer progra

orian

date the cost to tel Record 1837 ers, the east wan blocks needs to be cle or have new mortar ins

chimneys also needs to be built. The project cost now: But after any single p the system automatic

to re-inspect the damage, about nye years down the ro Paint a wall or a fence, and the system forms Mr. Genga and his staff of 48 y it's time to start looking for peeling program also ranks each job to sho me urgency of the repairs. "You know what you're going to do before you go out there," says Mr. Genga.

Bill Wilson, a trustee and chairman of the properties committee, says he was most alarmed that rusting of the steel frame of the 1892 Marble House had visibly lifted the exterior marble blocks, a process called oxide jacking. Mr. Wilson says he thought the problem was dormant, or not spreading. "I've been aware of it, but to have it appear as an action item is startling," he says. Ms. Coxe, who joined the society in

1998, doesn't blame her predecessors with hiding a looming repair bill. "We have an extremely good maintenance record," she says. "Nobody has done it with the precision and discipline that the McGinley Hart system brought to us.'

Still, Ms. Coxe has to find a way to pay for all this. The society's latest fiscal year, which ended March 31, was a good one: Revenue rose to \$13.45 million from about \$11 million a year earlier.

But to stay on course with repairs, more money will be needed. The society hired Firebrand LLC, a management consulting firm in Providence, R.I., to evaluate its financial performance, such as fund-raising, compared with other similar organizations, such as the Museum of Fine Arts in Boston. Next month, the firm will p esent ty to three business scenarios for the s consider. Ed O'Rourke, a Firebr rincipal, says the early indications courere are many way st revaging. enue

most pro

Ms. Coxe says it'll be a challenge to sell these ideas to the trustees, some of whom are strict preservationists. Says Mr. Wilson, the trustee: "There is a conflict within the preservation society about food service. Where do you put those facilities in a preservation environment? Even the gardens are historic structures.

These Old Houses

How the Preservation Society of Newport County gets its money

SOURCE OF REVENUE	AMOUNT
Admissions	\$6,953,886
Merchandise sales at stores	2,836,555
Hosting weddings and corporate events	1,039,116
Draw from endowment investments	1,022,272
Fundraising events	586,875
Licensing royalties	363,779
Membership fees	218,075
Unrestricted gifts	209,871
Academic programs	150,187
Interest from bank accounts	74,312
Total	\$13,454,928

Source: Preservation Society of Newport County, operating report for 12 months ended March 31.

Organizations are using The system now a m

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Architecture, Planning, Historic Preservation, Interior Design

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