


Transition Studies

More Pros than Cons



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What is a Transition Study and What Value Does it Provide?

When community associations assume ownership of their buildings, the process is essentially no different than an individual purchasing a car or home, or making a substantial investment in the stock market. Performing due diligence is always good practice to ensure you are getting what you paid for. Although individual unit owners may have performed some due diligence through home inspections, the ownership “transition” period is the most opportune time for community associations to assess the condition of their common elements. Such assessments, commonly known as transition studies, should be performed by experienced engineering professionals that have the expertise to identify potential deficiencies that may require future attention.

Transition studies should not be confused with reserve studies. Reserve studies are typically more cursory in nature and are intended to provide financial information on future repairs and capital projects projected over a specified period of time. Although reserve studies often include a field review of the condition of various common elements, their primary focus is not to address design or construction defects. The focus of a reserve study is to assess anticipated repairs and capital projects for the purpose of long-term budgeting.

The objectives of a transition study are most commonly outlined as follows:

1. Evaluate potential deficiencies in the design and construction of major building components and systems.
2. Evaluate the overall quality of construction.
3. Identify apparent building deficiencies that can result in increased future maintenance and expedited deterioration.
4. Evaluate building code compliance issues such as failure to meet ADA requirements or non-compliant ventilation rates.

To achieve these objectives, engineering professionals perform a detailed review of available documentation, conduct field investigations, and prepare detailed reports. The documentation review often includes a review of design and/or construction drawings, maintenance logs, warranties, and other pertinent documents. Field investigations are then performed and include a visual review of all common area components and building systems, which can be grouped into component categories. Although each project is unique, such component categories may include the following:

- Site elements (i.e., driveways, surface parking, landscaping, fencing, exterior amenities)
- Roofing and waterproofing
- Parking garages
- Facade (i.e., cladding, windows, doors, balconies)
- Corridors and public areas (including finishes, furnishings, and equipment)
- Heating System(s)
- Cooling System(s)
- Domestic Hot Water System(s)
- Domestic Cold Water System(s)
- HVAC Control System
- Ventilation and Exhaust Systems
- Pumps
- Fans
- Common Area Lighting
- Electrical Infrastructure and Backup Power
- Fire Protection System(s)
- Life Safety System(s)
- Elevators


Often times, it is not possible to identify all potential (in some cases perceived) deficiencies without input from unit owners. As such, the preparation and review of unit owner surveys can be a valuable part of developing a transition study. Persistent reports of issues by unit owners may indicate significant underlying problems. Experienced engineers use such surveys to determine what building systems or components should be subjected to additional scrutiny.

Given the complexity of today's building systems, no single consultant is an expert in all these components and systems. In some cases, the prime consultant may recommend involving sub-consultants to assist with an evaluation of some systems. For example, building professionals typically retain mechanical, electrical, plumbing (MEP) and elevator specialists to assist in the evaluation of such building systems.

Transition studies are valuable tools regardless of whether significant defects or deficiencies are suspected. In the case of deficiencies, a transition study can serve as the

basis to compel the developer to remedy those deficiencies that, if not detected, would become the responsibility of the community association assuming ownership.

It is important to understand that transition studies are not intended to serve as punch list inspections. They are only intended to reveal major code violations or deficiencies. As such, certain minor issues such as missing electrical junction box covers, or small openings in exterior sealant joints will likely not be detected through a transition study.

Additionally, the value of the transition studies is directly proportional to the extent of effort invested and the qualifications of the firms performing them. The results and value of the transition studies can therefore vary greatly depending on the fees and qualifications of the firms performing them. 

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