

OFM

Facilities Oversight & Planning

2024 Facilities Inventory & 2025-31 Six-Year Facilities Plan

Combined Instructions

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INTRODUCTION

The annual [Statewide Facilities Inventory](#) and biennial [Six-Year Facilities Plan](#) provide critical data on the current state of Washington's facilities portfolio, as well as the long-term facility needs of agencies. The data we collect this year will be used to: (1) document agency plans to right-size their physical footprint, (2) report actual and unrealized opportunities to reduce leased office space per [OFM's Directive](#), and (3) support the 2025-27 budget development process, with a focus on efficiency and collocation as agencies implement and refine hybrid work environments.

As part of this year's six-year planning process, agencies will report current telework participation and facility utilization rates and will provide a rationale for planned facility actions, including renewals, at each [in-scope office location](#). Accurate space use data, along with updated narratives on agency business needs, will enable decision-makers to better assess project priorities and identify opportunities for improved efficiency.

INVENTORY & SIX-YEAR FACILITIES PLAN OVERVIEW

Annual Facilities Inventory

Since 1997, [RCW 43.82.150](#) has required all Washington state agencies, departments, boards, commissions and institutions to report their inventory of state-owned and leased facilities as of June 30 each year. The Facilities Portfolio Management Tool (FPMT) serves as the system of record for Washington's facilities inventory. All facility data is collected and maintained in FPMT.

For the purposes of the Statewide Facilities Inventory, a facility is defined as: *a building with at least one wall, a roof and a permanent foundation, regardless of occupancy*. Facilities do not include roads, bridges, parking areas, utility systems and other similar improvements to real property.

Per OFM's statewide [inventory policy](#), ***inventory data in FPMT must be current and accurate each month***. OFM will take a snapshot of the data on June 30 to comply with our reporting requirements.

Biennial Six-Year Facilities Plan

[RCW 43.82.055](#) directs OFM to work with state agencies to develop a biennial Six-Year Facilities Plan outlining the long-term facility needs of state government to ensure cost-effective planning and the efficient use of space. The Six-Year Facilities Plan gives agencies the opportunity to articulate anticipated needs and desired actions, ranging from relocation projects to downsizing and collocation with another agency.

Development of the Six-Year Facilities Plan is a two-step process: baseline data collection in FPMT and [Agency Desired Plan](#) (ADP) submittal outside of the system. Inventory data, which includes data points that only apply to facilities that are in scope for the Six-Year Facilities Plan, serves as the baseline. The ADP defines an agency's desired action, ranging from no action or renewal to relocation, downsize or major improvement, for each in-scope facility for the time period covered by the plan. All planned projects require a [Project Request Form](#), which outlines business need as well as location, size and cost of the project.

SIX-YEAR FACILITIES PLAN IN-SCOPE CRITERIA

The Six-Year Facilities Plan represents a subset of the overall statewide inventory. The following office [space types](#) for both owned and leased facilities are in scope for the 2025-31 Six-Year Facilities Plan.

Space Type	Space Type Number
Office – General	310
Office – Administrative	311
Office – Services	312
Office – Project	313
Office – Field*	314

*New space type as of April 2024

Out-of-Scope Facilities

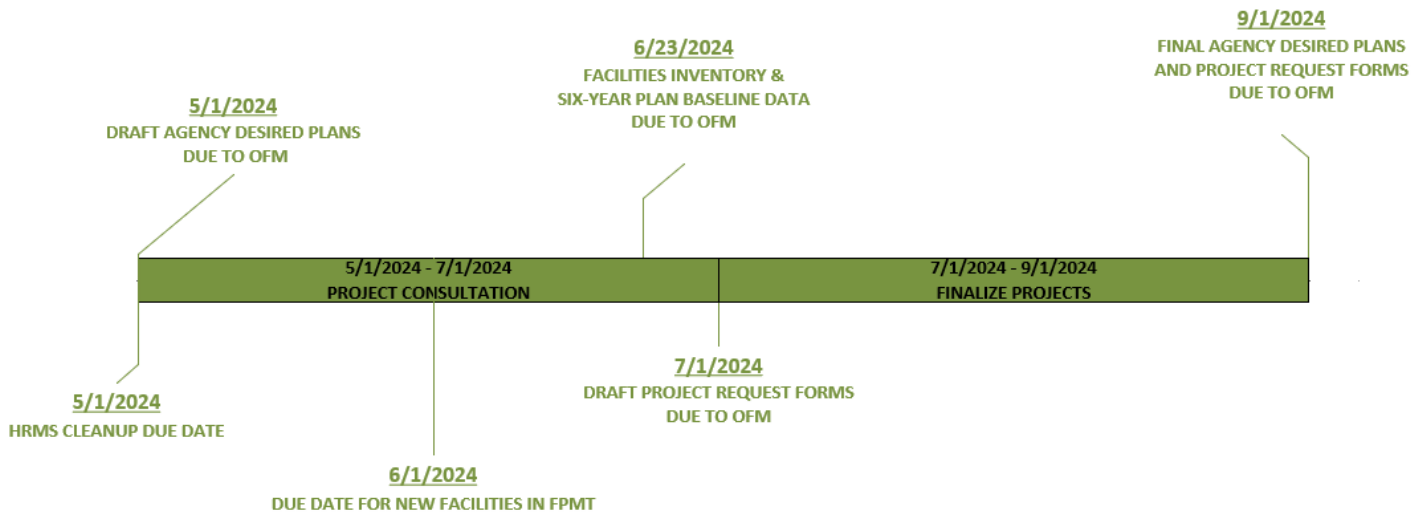
The following facility types are out of scope for the 2025-31 Six-Year Facilities Plan:

- All higher education
- School for the Blind and School for the Deaf
- State park facilities
- Owned DNR trust assets
- Fish hatcheries and wildlife areas
- Washington state commodity commissions
- Owned historical societies
- Owned military facilities
- Owned residential police and fire training facilities (WSP and CJT)
- Radio communications sites
- Facilities that are part of the transportation system such as weigh stations, ferry terminals, toll booths, tunnel/bridge workspaces, etc.
- Residential detention facilities (adult and youth)
- Residential mental health facilities and inpatient evaluation treatment centers
- Public restrooms

OFM has validated each agency's in-scope facilities in FPMT. To see a list of your agency's in-scope facilities, run the [Agency Desired Six Year Facilities Plan](#) report.

REPORTING TIMELINE

Refer to the timeline below for a high-level overview of key reporting due dates.



FPMT DATA REQUIREMENTS, SUBMISSION PROCESS AND DUE DATES

Overview

Agencies report inventory and Six-Year Facilities Plan data in FPMT concurrently. This cycle includes additional requirements, which are needed for a new lease comparison report OFM will submit to the Legislature. OFM has updated its statewide [policies](#) to reflect these new requirements.

Per statute, data must be current as of June 30, 2024, when OFM takes a snapshot. For example, a lease that ends on June 30 should have an active status in FPMT. Leases that expire prior to June 30 should be renewed, extended, placed in holdover, or deactivated as applicable. Please refer to the [FPMT Combined Data Requirements Checklist](#) for a detailed overview of required system updates along with step-by-step instructions.

Data Requirement Highlights

New Reporting Requirements for In-Scope Facilities

OFM has updated the [Statewide Facilities Inventory Policy](#) to include data points that have historically been reported every other year as part of the six-year planning process. These requirements are still limited to locations that are in scope for the Six-Year Facilities Plan, but reporting is now required more frequently, as change happens in an agency's portfolio. All inventory data should be current and accurate each month.

Updated inventory requirements include:

- Workstation counts*
- Debt service, if applicable and not already reported in FPMT**
- One-time cost data for lease and receivable lease renewals and relocations***

*Please designate any unassigned workspace (e.g., office, cubicle, etc.) that could be used for hoteling as a touchdown space.

**If you need to report debt service, please contact your [assigned facilities analyst](#), and OFM will import this data for you.

**New fields were recently added to the lease and receivable contract tables in FPMT to capture tenant improvement and other one-time costs. This data is required for OFM's new lease comparison report, which will be submitted to the Legislature with the 2025-31 Six-Year Facilities Plan and annually thereafter. For this reporting cycle, focus on renewals and relocations that have occurred in fiscal year 2024. If any of the one-time cost fields are relevant to your leased facilities and actuals are not available, enter an estimate. Do not leave the fields blank. When actuals are available, update the record. Receivable lease tenants will work with their facilities analyst to report required one-time cost data.

Existing Inventory Requirements

The following data requirements are not new and are applicable to all facilities in the inventory.

- Reporting all receivable leases*
- Reporting available space, if applicable. Available space refers to unused or unneeded space that could be made available to another agency.
- Reporting a current condition assessment score for all owned and leased facilities. This data is statutorily required per [RCW 43.82.150](#).
- Attaching a copy of each lease/receivable contract or amendment in FPMT.

*A receivable lease, or sublease, is a lease agreement between an agency that owns a building or is the holder of the master lease and a tenant. All receivable leases must be reported, including subleases to private entities. The master lease holder/owning agency is responsible for entering most receivable lease data into FPMT. The tenant agency is responsible for reporting its workstation counts.

Data No Longer Reported via FPMT

Unlike previous reporting cycles, agencies do not need to report the following data in FPMT.

- User counts – OFM will import user data from HRMS on a monthly basis.*
- Operating costs – OFM will apply an operating cost proxy to owned and leased facilities based on CBRE facility benchmarking analytics.

*May 1 is the due date for agencies to clean up their HRMS data, including duty station assignments and telework participation and schedules. Per the [HRMS Data Validation Guide](#), this data must be maintained and accurate each month.

FPMT Roles and Permissions

As of April 2024, FPMT has been updated to remove accounting functionality and integration with the Agency Financial Reporting System (AFRS). Moving forward, agencies will meet their Governmental Accounting Standards Board (GASB) reporting requirements in a new system called [DebtBook](#). As a result of this change, there is only one agency editor role in FPMT, which has access to all wizards.

Refer to the [Request New User Account](#) job aid for instructions on creating a new FPMT account. By default, all new accounts begin as Read Only. Edit rights must be requested and approved by each agency's [FPMT Administrator](#).

FPMT Wizards

Agency users are no longer able to manually edit data in FPMT and must use wizards to complete system updates. Business process wizards are available for all core tasks, including renewing leases, deactivating facilities, and creating new, or updating existing, owned, leased and receivable facilities.

Wizards guide users through each step of the process and automate steps like linking tables and changing table statuses. This simplifies the overall experience and supports reduction of data errors.

What's New with FPMT Wizards

- All wizards are now a single-step process.
- Users will create a new Space table as part of the lease and receivable lease renewal processes. This step is needed to accurately populate data in OFM's new lease comparison report.
- The Lease Review and Receivable Review wizards allow users to edit all tables associated with the agency's leased and receivable facilities.
- A new Owned Facility Review wizard is now available and allows users to update all tables associated with their agency's owned facilities.

Data Validation

Agencies are expected to validate their inventory and Six-Year Facilities Plan data, and are required to run and review the system-generated QA report to check for, and correct, missing and/or invalid data.

As part of the recent FPMT system updates, OFM combined all of the QA checks into a single report. The updated QA Report includes square footage errors as well as errors related to lease and receivable contract data. Please refer to OFM's [data validation instructions](#), also included as Appendix A, for specific guidance on how to validate your data.

The QA report flags the most common types of data errors, but it is not exhaustive. If OFM finds a more complex error, staff will contact you for additional correction steps.

FPMT Data Submission Process

After data is validated, each agency will notify OFM via FPMT that its data is complete. This functionality will automatically generate an email to OFM with a copy to the agency user. Refer to the [FPMT Data Submission](#) job aid, also included as Appendix B, for step-by-step instructions.

If your agency has entered new facilities into FPMT, do not submit your data until you have received notification that they have been approved by OFM.

FPMT Due Dates

All data is due to OFM by **June 23, 2024**. As a reminder, inventory data should be current and accurate each month in FPMT. This deadline is to ensure relevant updates are included in OFM's annual report to the Legislature.

NOTE: New facilities must be entered into FPMT by **June 1** to allow sufficient time for OFM review and approval.

OFM will send reminder emails ahead of defined due dates and will confirm receipt when agencies submit their data. Agencies will be notified if data has been accepted or if correction steps are required.

AGENCY DESIRED PLAN (ADP) AND DUE DATES

OFM has updated the ADP report, which defines an agency’s desired action for each in-scope facility for the time period covered by the Six-Year Facilities Plan. Agencies download their ADP report from FPMT and manually populate the Planned Actions section for each facility.

In the newly updated report, the system will populate more information about each location, and agencies will report additional details about their planned actions. The report also features improved formatting, including drop-down lists for fields with defined options.

Agencies are required to populate the following data for all planned actions, whether or not there is a planned project.

- Action Type
- Action Fiscal Year
- Action Rationale

In addition to the above, agencies must report the following information for planned projects.

- Projected SF
- Projected Users
- Does this project result in a downsize or consolidation? (drop-down list)
- Project Funding (drop-down list)
- Lease Savings, if applicable
- Priority Ranking

In an effort to improve clarity and streamline options, OFM has also updated the action types and their definitions.

The following action types are available in the 2025-31 Six-Year Facilities Plan:

Action Type	Definition
Close	To shut down all operations at that location. No new space is required (e.g., all staff are fully remote or a program has ended).
Consolidate	To close one or more existing locations and consolidate operations into a different existing location within the agency’s current portfolio.
Demolish	This project type is specific to state-owned facilities and is used when a building will be destroyed and removed from the state’s inventory.
Dispose	Selling a facility to a non-state agency entity (i.e., removing the facility from the state’s inventory) or transferring a facility to a different state agency.
Major Improvement	A one-time cost exceeding \$250,000 to improve an owned or leased facility, not covered by another Action Type.
New Space	A new space that is not currently part of an agency’s facilities inventory. May or may not involve relocating staff.
No Action	No planned change for an owned facility or a long-term lease that will not end during the six-year planning cycle.
Renew	Renewing in place.

Refer to the [Agency Desired Plan](#) job aid, also included as Appendix C, for more detailed instructions.

All action types except No Action and Renew (with no change in SF) require a [Project Request Form](#). This updated form is designed to be more efficient, and the amount of data required is based on the project type and when the project will take place. For example, a request to dispose of an owned facility will require less data than acquiring new space. Likewise, project requests slated to happen in fiscal years 2028 through 2031 will require less detail than those happening within the first three fiscal years of the plan.

Refer to the [Project Request Form Instructions](#), also included as Appendix D, for field-specific guidance.

ADP and Project Request Form Submittal Process and Due Dates

ADP reports and Project Request Forms are submitted to OFM via email at ofmfacilitiesoversig@ofm.wa.gov. Please refer to the due dates below.

The final ADP and Project Request Form(s) must be approved and submitted by the agency director or designee no later than **September 1**. If an agency has no planned projects, the draft ADP will serve as the final as long as it is submitted by the agency director.

Directors and/or designees may indicate their approval via the body of their email.

Draft ADP Report	May 1
Draft Project Request Forms	July 1
Final ADP and Project Request Forms	September 1

OFM will confirm receipt of ADPs and Project Request Forms as they are received. Final plans must be aligned with the Governor’s proposed budgets, and agencies should ensure their 2025-27 facilities-related budget submittals are consistent with any planned projects. OFM will announce approved plans when the 2025-31 Six-Year Facilities Plan is published.

CONTACT INFORMATION

For questions about the Statewide Facilities Inventory or Six-Year Facilities Plan processes, please contact your [OFM Facilities Analyst](#) or send an email to ofmfacilitiesoversig@ofm.wa.gov.

For assistance with FPMT, please contact the OFM Help Desk at HereToHelp@ofm.wa.gov or (360) 407-9100.



This job aid provides step-by-step instructions for running and reviewing FPMT’s QA Report, which captures the most common types of square footage and financial data errors.

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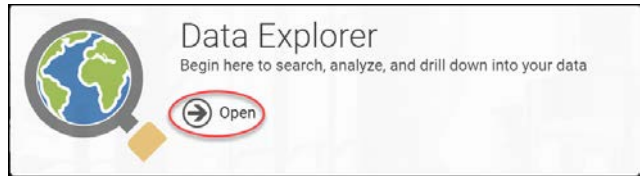
Overview


Where do I access the QA Report?	<ul style="list-style-type: none"> The QA report is accessed from the agency tile. Select the menu button, Reports, and QA Report. The report will open in a separate window, and you will have the option of downloading the report in Excel or PDF format.
When should I run the QA Report?	<ul style="list-style-type: none"> The QA Report can be reviewed at any time to check for errors and may be used to identify contracts that have expired or will expire in the next 90 days. Agencies are required to validate their data and correct any errors prior to submitting their inventory data to OFM. If you have entered new owned or leased facilities, wait to run the QA Report until after you have received notification that the new facilities have been approved by OFM.
How do I know if I have errors in the QA Report?	<ul style="list-style-type: none"> Errors/flags are grouped in tabs by category. For most tabs, the goal is to have a “clean” QA, which means the worksheet will not have any content. The report also includes a list of lease and receivable contracts that will expire in the next 90 days. Make sure to check each tab for errors/flags.
What types of errors are included in the QA Report?	<ul style="list-style-type: none"> The QA Report captures common types of errors related to square footage and financial data.
How do I fix the errors listed in the QA Report?	<ul style="list-style-type: none"> Refer to the QA Report – Correction Steps job aid for instructions on how to fix errors in the QA report. The square footage errors are explained on the first tab, and the financial data errors are explained on the second tab.
How do I know if the correction steps worked?	<ul style="list-style-type: none"> Rerun the QA Report after making corrections. If you have correctly followed the data validation instructions, the report will no longer include the specific errors/flags you have addressed.

Run the QA Report

Navigate to the agency tile and run the QA Report.

1. **Open** the Data Explorer module.



2. **Select** the  Search button on the data explorer tool bar.

3. **Select** Filter by ▾ and choose **Agencies**.

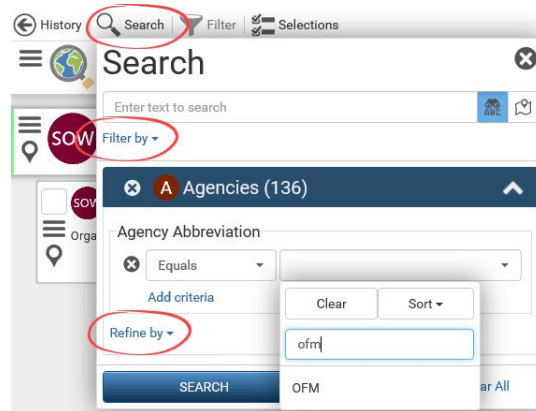
4. **Select** Refine by ▾ and choose **Agency Abbreviation**.


→ These are SAAM acronyms.

5. **Enter** the abbreviation.

→ You can type in the text box to filter the list.

6. **Select** 



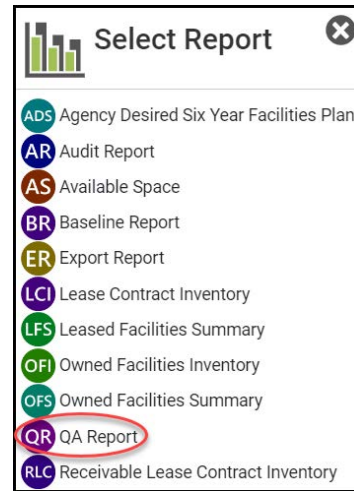
7. **Select** the  menu button on the agency tile.

8. **Select**  Reports



9. **Select QA Report.**

→ The report will open in a new window.

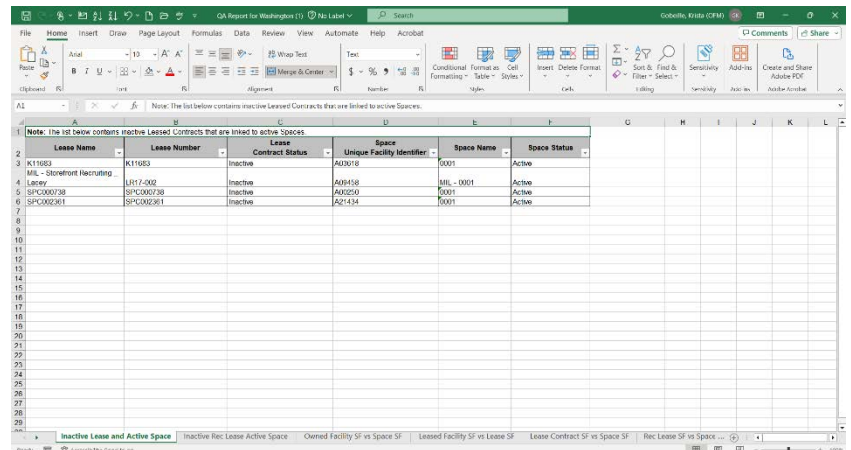


10. **Select Download Excel Report**



Correct Data Errors

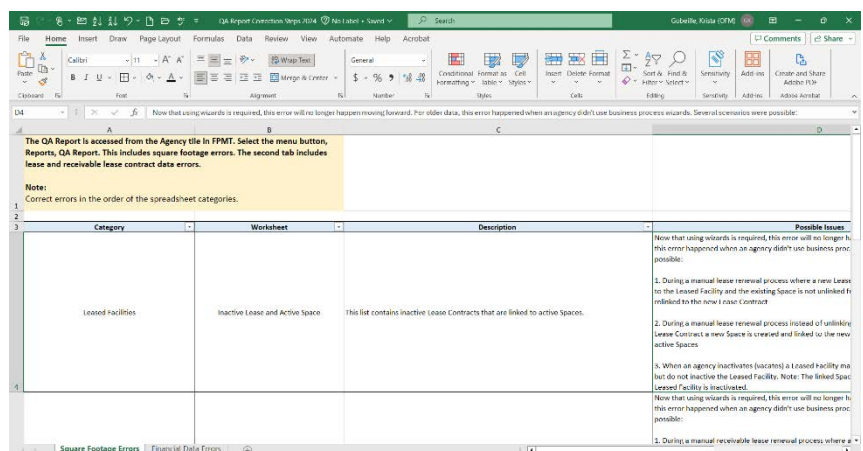
1. **Review** all 12 tabs for errors.



2. If errors are present, follow the instructions in the [QA Report – Correction Steps](#) job aid.

→ Square footage errors are explained in the first tab, and financial data errors are explained in the second tab.

→ In the Workbook column, you will find error types that correspond to each of the tab names in the QA Report, along with a description of the error, causes and correction steps.



3. **Rerun** the QA Report to ensure the errors were fixed.



Overview

FPMT includes functionality that allows agencies to notify OFM via the system when their data is complete.

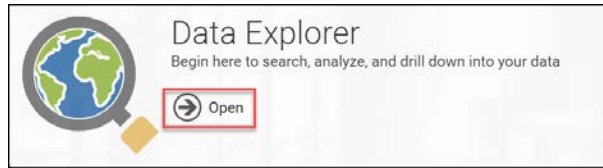
- ✓ All FPMT data is due to OFM by June 23, 2024.
- ✓ New facilities must be entered into FPMT by June 1, 2024.
- ✓ Do not submit your data until new facilities have been approved by OFM.
- ✓ If you need to create a new FPMT account, please refer to the [Request New User Account](#) job aid.
- ✓ Please note that all new accounts are Read Only by default. Edit rights must be requested and approved by your agency's [FPMT Administrator](#) via an email to the [OFM Help Desk](#).
- ✓ For instructions on how to reset your password, please refer to the [Reset or Change Password](#) job aid.
- ✓ For help with FPMT, please contact the OFM Help Desk at HereToHelp@ofm.wa.gov or (360) 407-9100.
- ✓ For questions about the Facilities Inventory or Six-Year Facilities Plan, please contact your assigned [OFM Facilities Analyst](#) or send an email to ofmfacilitiesoversig@ofm.wa.gov.


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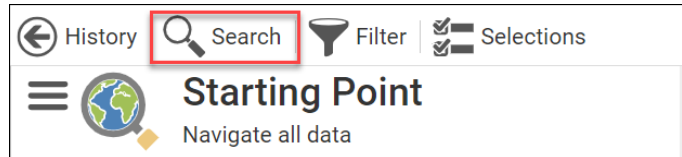
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Navigate to the Agency Notification Tile

1. **Open** the Data Explorer module.

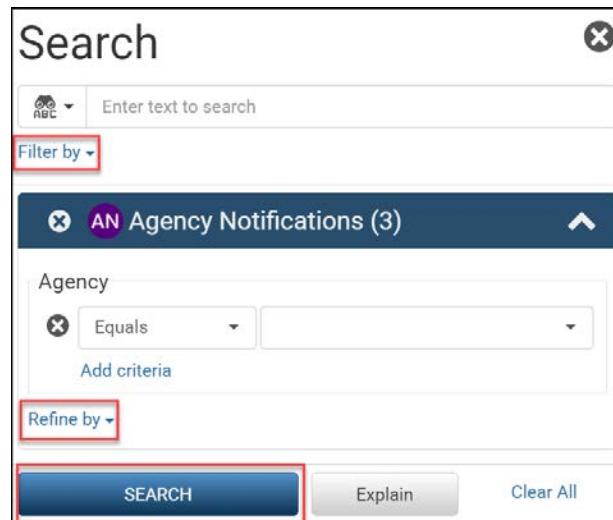


2. **Select** the  Search button on the data explorer tool bar.



3. **Select** Filter by ▾ and choose **Agency Notification**.

4. **Select** Refine by ▾ and choose **Agency**.

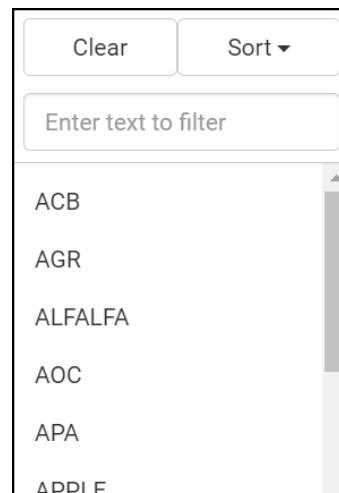


5. **Select** your agency acronym from the list


→ You can filter the list by typing in the box.

→ These are [SAAM abbreviations](#).

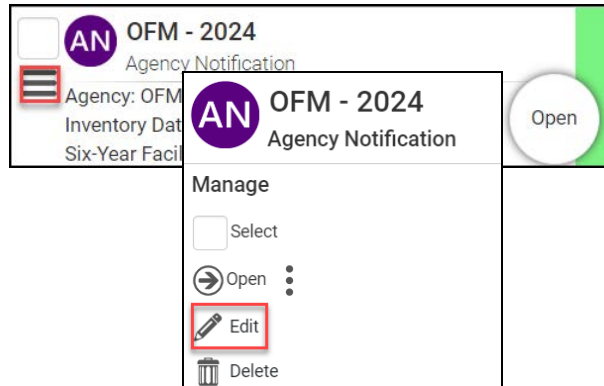
6. **Select** 



Submit Your Data

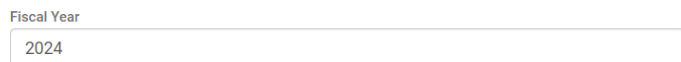
1. **Select** the  menu button on the 2024 Agency Notification tile.
 - There will be a new tile for each year.
 - OFM has pre-populated whether your agency is required to report Inventory and Six-Year Plan data.

2. **Select**  Edit



3. **Update** fields as applicable
 - Inventory Data Complete
 - ➔ Defaulted to No
 - ➔ Update the field to Yes if you are ready to submit your inventory data to OFM.
 - Baseline Data Complete
 - ➔ Defaulted to No
 - ➔ Update the field to Yes if you are ready to submit your baseline data to OFM.
 - Fiscal Year (pre-populated)
 - ➔ Do not change this field.





4. **Select** SAVE AND CLOSE
 - ➔ You may submit your inventory and baseline data individually or at the same time.
 - ➔ When you change the field to Yes and save the record, the system will send an email to OFM and the user.
 - ➔ When OFM approves or denies your data, you will receive an email from the system.
 - ➔ If OFM denies your data due to errors, you will receive additional information with needed correction steps.





As part of the biennial Six-Year Facilities Plan process, agencies must download their Agency Desired Six Year Facilities Plan Report (ADP), which lists the agency’s in-scope facilities for the plan, and indicate their planned action for each location.

- ✓ The Agency Desired Six Year Facilities Plan Report is accessed from the agency tile in FPMT.
- ✓ When you run the report, you will be prompted for the fiscal year. **Enter 2024.**
- ✓ Download and save the report in Excel format. FPMT will give you the option of Excel or PDF.
- ✓ ADP reports are submitted via email at ofmfacilitiesoversig@ofm.wa.gov.
- ✓ Agency directors must approve and submit the final ADP and Project Request Form(s).
- ✓ For questions about the ADP report, please contact your [Facilities Analyst](#) or send an email to ofmfacilitiesoversig@ofm.wa.gov.

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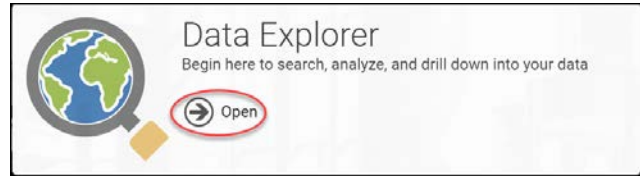
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Overview

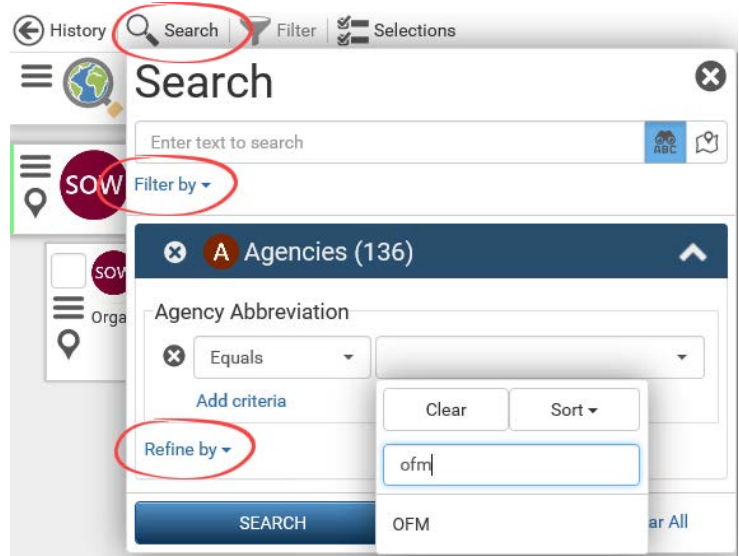
What is the Agency Desired Plan (ADP)?	<ul style="list-style-type: none"> The Agency Desired Plan (ADP) is an FPMT report that allows agencies to indicate their planned action for each in-scope facility in the Six-Year Facilities Plan.
Who is required to submit an ADP?	<ul style="list-style-type: none"> Agencies that participate in the Six-Year Facilities Plan are required to submit an ADP. Agency directors must approve and submit final ADP and Project Request Forms. Directors may approve the plan via the body of their email or attach an approval memo.
Where do I run the ADP?	<ul style="list-style-type: none"> The ADP is accessed from the agency tile in FPMT.
When do I run the ADP?	<ul style="list-style-type: none"> ADPs are downloaded as part of the Six-Year Facilities Plan process. <ul style="list-style-type: none"> Draft ADP is due May 1. Final ADP is due September 1. If an agency has no planned projects, the draft ADP will serve as the final as long as the agency director or designee submits the report.
Where can I find action type definitions?	<ul style="list-style-type: none"> Definitions and scenarios are available in this job aid.
When are Project Request Forms required?	<ul style="list-style-type: none"> A Project Request Form is required for all projects in the Six-Year Facilities Plan (i.e., all action types except No Action or Renew (with no change in SF)). Refer to the Project Request Form Instructions for field-specific guidance. A life cycle cost analysis is required for all projects over 20,000 SF.
How do I submit my agency's ADP?	<ul style="list-style-type: none"> Run the ADP in FPMT, download the report in Excel format and manually populate the planned actions section for each in-scope facility. Email reports, and any associated Project Request Forms, to OFM via ofmfacilitiesoversig@ofm.wa.gov. Agency directors must approve and submit final ADP and Project Request Forms.

Run the ADP Report

1. **Open** the Data Explorer module.



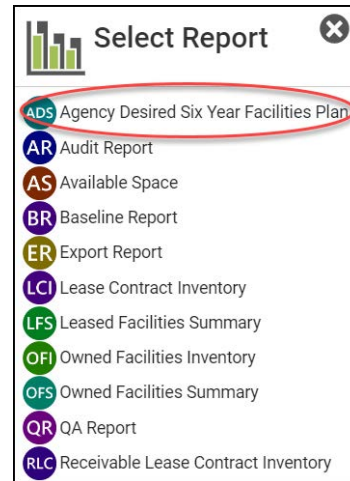
2. **Select** the Search button on the data explorer tool bar.
3. **Select** Filter by and choose **Agencies**.
4. **Select** Refine by and choose **Agency Abbreviation**.
5. **Select** your agency from the list
 → These are [SAAM abbreviations](#).
 → You can filter the list by typing in the box.
6. **Select**



7. **Select** the menu button on the agency tile.
8. **Select** Reports



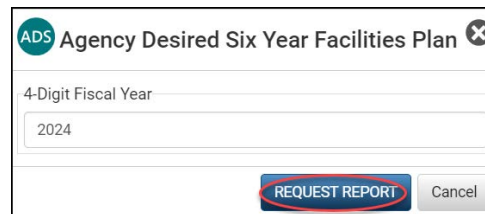
9. **Select** Agency Desired Six Year Facilities Plan



10. **Enter** 2024 as the 4-Digit Fiscal Year

11. **Select** Request Report

→ The report will open in a new window.



12. **Select** Download Excel Report

[Download Excel Report](#)

Manually Populate Planned Actions

1. **Populate** the Planned Actions section of the report for each in-scope facility.

→ For all planned actions, populate:

- Action Type (definitions below)
- Action Fiscal Year
- Action Rationale

→ For planned projects (including renewing in place with a change in SF), populate:

- Projected SF for Project
- Projected Users for Project
- Does this Project Result in a Downsize or Consolidation?
- Project Funding
- Lease Savings, if applicable
- Project Priority Ranking

→ All projects required a [Project Request Form](#).

Action Type	Action Fiscal Year	Action Rationale	Planned Actions			Project Funding	Lease Savings, if applicable (round to nearest thousand)	Project Priority Ranking
			Projected SF For Project	Projected Users For Project	Does this Project Result in a Downsize or Consolidation?			

Action Type Definitions

Refer to the [Planned Action Scenarios](#) for additional guidance.

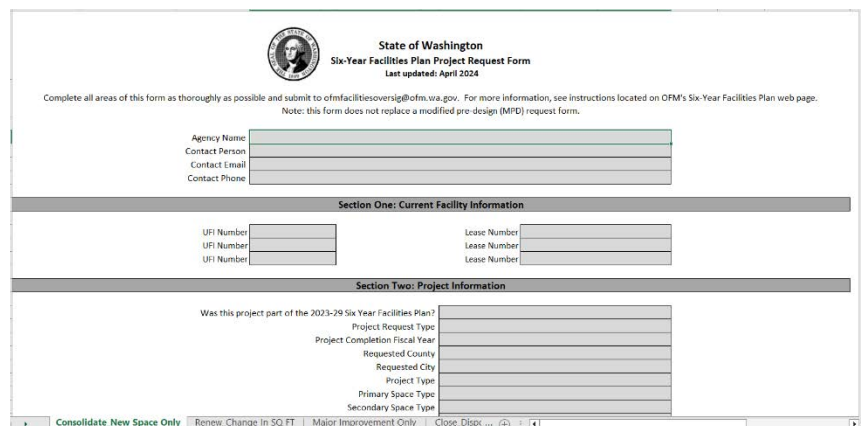
Action Type	Definition
Close	To shut down all operations at that location. No new space is required (e.g., all staff are fully remote or a program has ended).
Consolidate	To close one or more existing locations and consolidate operations into a different existing location within the agency's current portfolio.
Demolish	This project type is specific to state-owned facilities and is used when a building will be destroyed and removed from the state's inventory.
Dispose	Selling a facility to a non-state agency entity (i.e., removing the facility from the state's inventory) or transferring a facility to a different state agency.
Major Improvement	A one-time cost exceeding \$250,000 to improve an owned or leased facility, not covered by another Action Type.
New Space	A new space that is not currently part of an agency's facilities inventory. May or may not involve relocating staff.
No Action	No planned change for an owned facility or a long-term lease that will not end during the six-year planning cycle.
Renew	Renewing in place.

Submit ADP Report

- Save and email** your report to OFM via ofmfacilitiesoversig@ofm.wa.gov.
 - Draft ADP due May 1.
 - Final ADP due September 1.

Project Request Forms

- Complete** a [Project Request Form](#) for all action types except No Action and Renew with no change in SF.
- Refer** to [Project Request Form Instructions](#) for field-specific guidance.
 - Draft forms due July 1.
 - Final forms due September 1.
 - A [life cycle cost analysis](#) is required for projects over 20,000 SF.
 - Final ADP and Project Request Form(s) must be submitted by the agency director or designee.



State of Washington
Six-Year Facilities Plan Project Request Form
Last updated: April 2024

Complete all areas of this form as thoroughly as possible and submit to ofmfacilitiesoversig@ofm.wa.gov. For more information, see instructions located on OFM's Six-Year Facilities Plan web page. Note: this form does not replace a modified pre-design (MPD) request form.

Agency Name:
 Contact Person:
 Contact Email:
 Contact Phone:

Section One: Current Facility Information

URI Number: Lease Number:
 URI Number: Lease Number:
 URI Number: Lease Number:

Section Two: Project Information

Was this project part of the 2023-29 Six Year Facilities Plan?

Project Request Type:
 Project Completion Fiscal Year:
 Requested County:
 Requested City:
 Project Type:
 Primary Space Type:
 Secondary Space Type:

Consolidate, New Space Only, Renew, Change in SQ FT, Major Improvement Only, Close, Dispc ...

Planned Action Scenarios

Owned Facilities

- No Action
- Major Improvement
- Demolish
- Dispose (sell or transfer)

Lease/Receivable Renewals

- Renew (no change in SF or one-time costs)*
- Renew (with change in SF)**
- Major Improvement***

Leased/Receivable Closures

- Close (no relocation, e.g., all staff are teleworking)
- Consolidate (relocating to existing facility (see receptor sites below) in the agency's inventory)
- New Space (relocating to new facility not currently in the agency's inventory)

Owned Receptor Sites¹

- No Action
- Major Improvement

Leased Receptor Sites

- Renew (no change in SF or one-time costs)*
- Renew (with change in SF)**
- Major Improvement***

New Space

- A new location that does not involve relocation (e.g., starting a new program that requires new space and hiring staff).

*No Project Request Form required.

**Project Request Form required. Complete entire Planned Action section in Agency Desired Plan (ADP) report.

***OFM will assume agency intends to renew at lease end.

¹Receptor site refers to an existing owned or leased facility in an agency's portfolio that will absorb staff as part of a consolidation project.



Project Request Form Overview

A [Project Request Form](#) is required for each proposed project in the 2025-31 Six-Year Facilities Plan. All action types except No Action and Renew (with no change in SF) require a Project Request Form. Field-specific instructions are available below. If you have questions, please reach out to your assigned [OFM Facilities Analyst](#).

Submit Project Request Forms to OFM via ofmfacilitiesoversig@ofm.wa.gov.

- **July 1:** Draft Project Request Forms are due to OFM.
- **September 1:** Final [Agency Desired Plans \(ADP\)](#) and Project Request Forms are due to OFM. Agency directors or a designee must approve and submit the final ADP and Project Request Forms.
- A [life cycle cost analysis](#) must be submitted with the Project Request Form for any New Space requests over 20,000 SF, except for projects in fiscal years 2028-31.

Field-Specific Instructions

The amount of data required varies by project type and when the proposed project is slated to take place. Use the links below to navigate to the desired project type.

Consolidate and New Space	1
Renew with a Change in SF.....	5
Major Improvement	9
Close, Demolish and Dispose.....	10
Outlying Years FY 28-31.....	12
Project Scenarios	15

Consolidate and New Space

Use this tab for the following scenarios:

- **Consolidate:** Closing one or more facilities and relocating staff to a facility that is currently part of the agency’s inventory.
- **New Space:** Closing one or more facilities and relocating staff to a facility that is not currently part of the agency’s inventory.
- **New Space:** Acquiring new space with no relocation of staff (e.g., starting a new program in an area without existing facilities and hiring new staff).

CONTACT INFORMATION

Field	Description
Agency Name	Agency’s SAAM name
Contact Person	Primary point of contact for request
Contact Email	Contact’s email address
Contact Phone	Contact’s phone number



SECTION ONE: CURRENT FACILITY INFORMATION AND UTILIZATION

Field	Description
UFI Number	The facility’s unique facility identifier (UFI) can be found in the Facilities Portfolio Management Tool (FPMT).
Lease Number	The lease number for the current facility, if not owned.

SECTION TWO: PROJECT INFORMATION

Field	Description
Was this project part of the 23-29 Six-Year Facilities Plan?	Select Yes if the project was included in the 23-29 plan. Select No if the project was not included in the 23-29 plan.
Project Request Type	Up To 20,000 SF Greater Than 20,000 SF: Also requires LCCM.
Project Completion Fiscal Year	Select the fiscal year in which the project will be completed.
Requested County	The county where the project is located.
Requested City	The city where the project is located.
Project Type	Consolidate: To close one or more existing locations and consolidate operations into a different existing location. New Space: A new space that is not currently part of an agency’s facilities inventory. May or may not involve relocating staff.
Primary Space Type	Space type that accounts for at least 60% of the total square footage. Office General (310): An office space housing staff, community volunteers, contractors, state agency partners or community partners working towards the agency mission in another capacity that does not fit within the criteria listed in the definitions for Administrative, Services, Field, and Project. Office Administrative (311): An office space housing staff primarily dedicated to administrative support for the agency mission. These offices typically have high telework eligibility. Examples include but are not limited to HR, IT, and Finance. Office Services (312): An office space housing staff primarily dedicated to direct delivery of services to the public. These offices typically have low telework eligibility. Examples include but are not limited to driver licenses examination facilities, unemployment benefit offices and community services offices. Office Project (313): An office space housing staff primarily dedicated to a major project in support for the agency mission. Examples include but are not limited to engineers, design teams and planning teams. Office Field (314): An office space housing staff primarily dedicated to conducting physical activities and processes in a specific area, outside the traditional office environment. These operations may have a minimal in-



	office component, such as reporting and other paperwork. Field offices typically have low telework eligibility. Examples include but are not limited to maintenance offices, oversight and support offices, program offices, and community offices.
Secondary Space Type	Secondary space type if applicable, otherwise N/A.
Requested Lease Term	The lease term in years. Note: A lease term greater than 10 years requires a life cycle cost analysis.
Cancellation Clause	Insert an X if a cancellation clause is required. Note: If a cancellation clause is required for this project, expect a higher cost for rent.

SECTION THREE: PROJECT BUSINESS CASE AND ALTERNATIVES

Field	Description
Business Case Questions	Please provide answers for each of the six business case questions. Clearly describe business need, the current condition of your facility, your agency’s preferred solution, and the impacts of not moving forward with this project.
Alternatives Considered	Describe two alternatives considered. Be prepared to speak with your facilities analyst about these alternative options.
How does this project support right-sizing office space?	Explain how the proposed project supports the state’s objective to right-size office space in light of increased telework and hybrid work environments.
Equity Questions	Please identify which communities will be positively or negatively impacted by the project and the services provided by the facility, and explain how negative impacts will be mitigated.

SECTION FOUR: SPACE ALLOCATION

This section includes formulas. Enter your data in the gray fields. Refer to the telework crosswalks on the Reference Tables tab for additional guidance on user type definitions.

Note: If the total space allocation is over 20,000 SF, a life cycle cost analysis must be completed.

Field	Description
Fully Remote Users	Enter the number of fully remote users (no regularly scheduled days in the office).
Externally Mobile Users	Enter the number of externally mobile users (in office less than 60% of the pay period).
Resident Users	Enter the number of resident users (in office at least 60% of the pay period).
Program Specific Spaces	Enter spaces that are unique to your agency's business needs and would not easily fit into the definition of workspaces or common spaces (e.g., interview rooms, training rooms, evidence storage, and service delivery lobby). Note: Include type and quantity of space needed (e.g., interview room X 3).



SECTION FIVE: PROPOSED SPACE UTILIZATION

OFM will use this data to calculate utilization ratio. The total number of offices and cubicles should not exceed the number of resident users. Touchdown spaces should have a 3:1 ratio for externally mobile users. The objective is to have 80% utilization of workspaces.

Field	Description
Workspace Types	<p>Enter the number of planned offices, cubicles, and touchdown spaces.</p> <p>Note: A touchdown space is an unassigned space that provides seating in varying forms to conduct work on an irregular basis or for short periods. Touchdown spaces can be unassigned offices and cubes.</p>

SECTION SIX: PROJECT ANNUAL AND ONE-TIME COSTS

This section includes formulas. Enter your data in the gray fields. **The projected annual cost is expected to be at the full-service rate.**

Field	Description
OFM Market Rate	Refer to the current OFM Market Rates for office space.
Funding Sources	<p>Enter an X for all funding sources that apply to this project.</p> <p>Agency Existing Facilities Funds: Existing operating funds used to fund facility costs.</p> <p>Other Operating Funds: Existing agency funds not currently allocated for facility costs.</p> <p>Future Budget Request: A Decision Package must be submitted to and approved by OFM and the Legislature to fund this project.</p>
Funding Source Code	Enter OFM recognized fund source code. The codes can be found at: https://ofm.wa.gov/accounting/fund/numeric .
One-Time Costs	<p>This section gives agencies the opportunity to request one-time costs based on their own set of assumptions as opposed to OFM’s standard assumptions.</p> <p>Enter your agency’s requested one-time costs in the provided fields. These are required fields, even if OFM’s assumptions are being used.</p> <p>DES Fees: These fees are from the DES fee structure, which can be found on their website.</p> <p>Tenant Improvement: The cost of construction to modify a facility to meet agency business needs. This one-time cost is typically due at the beginning of the lease start period.</p> <p>Technology/Infrastructure: Any cabling, network, server rack, and phone system costs required for the agency to move into the facility.</p> <p>New Furniture: The cost of purchasing new furniture for the facility. Please follow all state procurement laws for purchases.</p> <p>Relocation Furniture: The cost to move furniture from a previous location to</p>



	<p>a new location.</p> <p>Moving Staff: The cost associated with moving all items (other than furniture) to the new facility. This may include the cost to move a copier, etc.</p> <p>Building Security: The costs associated with installing security systems in the facility.</p> <p><i>Example:</i> keycard systems, camera systems, etc.</p> <p>Other Costs: This covers any additional one-time costs not already captured that are required for the agency to begin operations.</p>
Agency Assumptions	Detail your agency assumptions for each entered one-time cost.
Funding Sources	<p>Enter an X for all funding sources that apply.</p> <p>Agency Existing Facilities Funds: Existing operating funds used to fund facility costs.</p> <p>Other Operating Funds: Existing agency funds not currently allocated for facility costs.</p> <p>Future Budget Request: A Decision Package must be submitted to and approved by OFM and the Legislature to fund this project.</p>
Funding Source Code	Enter OFM recognized fund source code. The codes can be found at: https://ofm.wa.gov/accounting/fund/numeric .
If other funds will be used, please provide rationale and fund source authority	Please describe rationale and authority to use Other funds.

Renew with a Change in SF

Use this tab for the following scenarios:

- **Renew and downsize:** Renewing in place with a decrease in square footage.
- **Renew and expand:** Renewing in place with an increase in square footage.

CONTACT INFORMATION

Field	Description
Agency Name	Agency's SAAM name
Contact Person	Primary point of contact for request
Contact Email	Contact's email address
Contact Phone	Contact's phone number

SECTION ONE: CURRENT FACILITY INFORMATION AND UTILIZATION

Field	Description
UFI Number	The facility's unique facility identifier (UFI) can be found in the Facilities Portfolio Management Tool (FPMT).
Lease Number	The lease number for the current facility, if not owned.



SECTION TWO: PROJECT INFORMATION

Field	Description
Was this project part of the 23-29 Six-Year Facilities Plan?	Select Yes if the project was included in the 23-29 plan. Select No if the project was not included in the 23-29 plan.
Project Request Type	Up To 20,000 SF Greater Than 20,000 SF
Project Completion Fiscal Year	Select the fiscal year in which the project will be completed.
Requested County	The county where the project is located.
Requested City	The city where the project is located.
Project Type	Renew: Renewing in place with a change in square footage.
Primary Space Type	<p>Space type that accounts for at least 60% of the total square footage.</p> <p>Office General (310): An office space housing staff, community volunteers, contractors, state agency partners or community partners working towards the agency mission in another capacity that does not fit within the criteria listed in the definitions for Administrative, Services, Field, and Project.</p> <p>Office Administrative (311): An office space housing staff primarily dedicated to administrative support for the agency mission. These offices typically have high telework eligibility. Examples include but are not limited to HR, IT, and Finance.</p> <p>Office Services (312): An office space housing staff primarily dedicated to direct delivery of services to the public. These offices typically have low telework eligibility. Examples include but are not limited to driver licenses examination facilities, unemployment benefit offices and community services offices.</p> <p>Office Project (313): An office space housing staff primarily dedicated to a major project in support for the agency mission. Examples include but are not limited to engineers, design teams and planning teams.</p> <p>Office Field (314): An office space housing staff primarily dedicated to conducting physical activities and processes in a specific area, outside the traditional office environment. These operations may have a minimal in-office component, such as reporting and other paperwork. Field offices typically have low telework eligibility. Examples include but are not limited to maintenance offices, oversight and support offices, program offices, and community offices.</p>
Secondary Space Type	Secondary space type if applicable, otherwise N/A.
Requested Lease Term	The lease term in years. Note: A lease term greater than 10 years requires a life cycle cost analysis.
Cancellation Clause	Insert an X if a cancellation clause is required. Note: If a cancellation clause is required, expect a higher cost for rent.



SECTION THREE: PROJECT BUSINESS CASE AND ALTERNATIVES

Field	Description
Business Case Questions	Describe project rationale, including whether the project supports right-sizing office space, and the impacts if the project is not approved.
Alternatives Considered	Describe two alternatives considered. Be prepared to speak with your facilities analyst about these alternative options.
How does this project support right-sizing office space?	Explain how the proposed project supports the state’s objective to right-size office space in light of increased telework and hybrid work environments.
Equity Questions	Please identify which communities will be positively or negatively impacted by the project and the services provided by the facility, and explain how negative impacts will be mitigated.

SECTION FOUR: SPACE ALLOCATION

This section includes formulas. Enter your data in the gray fields. Refer to the telework crosswalks on the Reference Tables tab for additional guidance on user type definitions.

Note: If the total space allocation is over 20,000 SF, a life cycle cost analysis must be completed.

Field	Description
Fully Remote Users	Enter the number of fully remote users (no regularly scheduled days in the office).
Externally Mobile Users	Enter the number of externally mobile users (in office less than 60% of the pay period).
Resident Users	Enter the number of resident users (in office at least 60% of the pay period).
Program Specific Spaces	Enter spaces that are unique to your agency's business needs and would not easily fit into the definition of workspaces or common spaces (e.g., interview rooms, training rooms, evidence storage, and service delivery lobby). Note: Be sure to include the type of space and the quantity needed in the description field (e.g., interview room X 3).

SECTION FIVE: PROPOSED SPACE UTILIZATION

OFM will use this data to calculate utilization ratio. The total number of offices and cubicles should not exceed the number of resident users. Touchdown spaces should have a 3:1 ratio for externally mobile users. The objective is to have 80% utilization of workspaces.

Field	Description
Workspace Types	Enter the number of planned offices, cubicles, and touchdown spaces. Note: A touchdown space is an unassigned space that provides seating in varying forms to conduct work on an irregular basis or for short periods. Touchdown spaces can be unassigned offices and cubes.



SECTION SIX: PROJECT ANNUAL AND ONE-TIME COSTS

This section includes formulas. Enter your data in the gray fields. **The projected annual cost is expected to be at the full-service rate.**

Field	Description
OFM Market Rate	Refer to the current OFM Market Rates for office space.
Funding Sources	<p>Enter an X for all funding sources that apply to this project.</p> <p>Agency Existing Facilities Funds: Existing operating funds used to fund facility costs.</p> <p>Other Operating Funds: Existing agency funds not currently allocated for facility costs.</p> <p>Future Budget Request: A Decision Package must be submitted to and approved by OFM and the Legislature to fund this project.</p>
Funding Source Code	Enter OFM recognized fund source code. The codes can be found at: https://ofm.wa.gov/accounting/fund/numeric .
One-Time Costs	<p>This section gives agencies the opportunity to request one-time costs based on their own set of assumptions as opposed to OFM’s standard assumptions.</p> <p>Enter your agency’s requested one-time costs in the provided fields. These are required fields, even if OFM’s assumptions are being used.</p> <p>DES Fees: These fees are from the DES fee structure, which can be found on their website.</p> <p>Tenant Improvement: The cost of construction to modify a facility to meet agency business needs. This one-time cost is typically due at the beginning of the lease start period.</p> <p>Technology/Infrastructure: Any cabling, network, server rack, and phone system costs required for the agency to move into the facility.</p> <p>New Furniture: The cost of purchasing new furniture for the facility. Please follow all state procurement laws for purchases.</p> <p>Relocation Furniture: The cost to move furniture from a previous location to a new location.</p> <p>Moving Staff: The cost associated with moving all items (other than furniture) to the new facility. This may include the cost to move a copier, etc.</p> <p>Building Security: The costs associated with installing security systems in the facility.</p> <p><i>Example: keycard systems, camera systems, etc.</i></p> <p>Other Costs: This covers any additional one-time costs not already captured that are required for the agency to begin operations.</p>
Agency Assumptions	Detail your agency assumptions for each entered one-time cost.
Funding Sources	<p>Enter an X for all funding sources that apply.</p> <p>Agency Existing Facilities Funds: Existing operating funds used to fund facility</p>



	costs. Other Operating Funds: Existing agency funds not currently allocated for facility costs. Future Budget Request: A Decision Package must be submitted to and approved by OFM and the Legislature to fund this project.
Funding Source Code	Enter OFM recognized fund source code. The codes can be found at: https://ofm.wa.gov/accounting/fund/numeric .
If other funds will be used, please provide rationale and fund source authority	Please describe rationale and authority to use Other funds.

Major Improvement

Use this tab for the following scenario:

- **Major Improvement:** A one-time cost exceeding \$250,000 to improve an owned or leased facility, not covered by another Action Type. This does not include routine maintenance.*

CONTACT INFORMATION

Field	Description
Agency Name	Agency's SAAM name
Contact Person	Primary point of contact for request
Contact Email	Contact's email address
Contact Phone	Contact's phone number

*Routine maintenance refers to any maintenance task done on a planned and ongoing basis to identify and prevent problems before they result in building, infrastructure, or equipment failure.

SECTION ONE: CURRENT FACILITY INFORMATION AND UTILIZATION

Field	Description
UFI Number	The facility's unique facility identifier (UFI) can be found in the Facilities Portfolio Management Tool (FPMT).
Lease Number	The lease number for the current facility, if not owned.

SECTION TWO: PROJECT INFORMATION

Field	Description
Was this project part of the 23-29 Six-Year Facilities Plan?	Select Yes if the project was included in the 23-29 plan. Select No if the project was not included in the 23-29 plan.
Project Completion Fiscal Year	Select the fiscal year in which the project will be completed.
Requested County	The county where the project is located.
Requested City	The city where the project is located.



SECTION THREE: PROJECT BUSINESS CASE AND ALTERNATIVES

Field	Description
Business Case	Describe project rationale, including whether the project supports right-sizing office space.
Equity Questions	Please identify which communities will be positively or negatively impacted by the project and the services provided by the facility, and explain how negative impacts will be mitigated.

SECTION FOUR: PROJECT ONE-TIME COSTS

Field	Description
Estimated One-Time Costs	Enter your agency's requested one-time cost.
Agency Assumptions	Detail your agency assumptions for the requested one-time cost.
Funding Sources	Enter an X for all funding sources that apply. Agency Existing Facilities Funds: Existing operating funds used to fund facility costs. Other Operating Funds: Existing agency funds not currently allocated for facility costs. Future Budget Request: A Decision Package must be submitted to and approved by OFM and the Legislature to fund this project.
Funding Source Code	Enter OFM recognized fund source code. The codes can be found at: https://ofm.wa.gov/accounting/fund/numeric .
If other funds will be used, please provide rationale and fund source authority	Please describe rationale and authority to use Other funds.

Close, Demolish and Dispose

Use this tab for the following scenarios:

- **Close:** To shut down all operations at a location. No new space is required (e.g., all staff are fully remote or a program has ended).
- **Demolish:** This project type is specific to state-owned facilities and is used when a building will be destroyed and removed from the state's inventory.
- **Dispose:** Selling a facility to a non-state agency entity (i.e., removing the facility from the state's inventory) or transferring a facility to a different state agency.

CONTACT INFORMATION

Field	Description
Agency Name	Agency's SAAM name
Contact Person	Primary point of contact for request
Contact Email	Contact's email address
Contact Phone	Contact's phone number



SECTION ONE: CURRENT FACILITY INFORMATION AND UTILIZATION

Field	Description
UFI Number	The facility’s unique facility identifier (UFI) can be found in the Facilities Portfolio Management Tool (FPMT).
Lease Number	The lease number for the current facility, if not owned.

SECTION TWO: PROJECT INFORMATION

Field	Description
Was this project part of the 23-29 Six-Year Facilities Plan?	Select Yes if the project was included in the 23-29 plan. Select No if the project was not included in the 23-29 plan.
Project Completion Fiscal Year	Select the fiscal year in which the project will be completed.
Requested County	The county where the project is located.
Requested City	The city where the project is located.
Project Type	<p>Close: To shut down all operations at that location. No new space is required (e.g., all staff are fully remote or a program has ended).</p> <p>Demolish: This project type is specific to state-owned facilities and is used when a building will be destroyed and removed from the state’s inventory.</p> <p>Dispose: Selling a facility to a non-state agency entity (i.e., removing the facility from the state's inventory) or transferring a facility to a different state agency.</p>

SECTION THREE: PROJECT BUSINESS CASE AND ALTERNATIVES

Field	Description
Business Case Questions	Describe project rationale and who will be affected.
What UFI are impacted staff being relocated to?	If staff are being relocated, where are they going?
How does this project support right-sizing office space?	Explain how the proposed project supports the state’s objective to right-size office space in light of increased telework and hybrid work environments.
Equity Questions	Please identify which communities will be positively or negatively impacted by the project and the services provided by the facility, and explain how negative impacts will be mitigated.

SECTION FOUR: PROJECT ONE-TIME COSTS

Field	Description
Estimated One-Time Costs	Enter your agency’s requested one-time cost.
Agency Assumptions	Detail your agency assumptions for the requested one-time cost.



Funding Sources	Enter an X for all funding sources that apply. Agency Existing Facilities Funds: Existing operating funds used to fund facility costs. Other Operating Funds: Existing agency funds not currently allocated for facility costs. Future Budget Request: A Decision Package must be submitted to and approved by OFM and the Legislature to fund this project.
Funding Source Code	Enter OFM recognized fund source code. The codes can be found at: https://ofm.wa.gov/accounting/fund/numeric .
If other funds will be used, please provide rationale and fund source authority	Please describe rationale and authority to use Other funds.

Outlying Years FY 28-31

Use this tab for all proposed projects that would occur in fiscal years 2028-31.

CONTACT INFORMATION

Field	Description
Agency Name	Agency's SAAM name
Contact Person	Primary point of contact for request
Contact Email	Contact's email address
Contact Phone	Contact's phone number

SECTION ONE: CURRENT FACILITY INFORMATION AND UTILIZATION

Field	Description
UFI Number	The facility's unique facility identifier (UFI) can be found in the Facilities Portfolio Management Tool (FPMT).
Lease Number	The lease number for the current facility, if not owned.

SECTION TWO: PROJECT INFORMATION

Field	Description
Was this project part of the 23-29 Six-Year Facilities Plan?	Select Yes if the project was included in the 23-29 plan. Select No if the project was not included in the 23-29 plan.
Project Request Type	Up To 20,000 SF Greater Than 20,000 SF
Project Completion Fiscal Year	Select the fiscal year in which the project will be completed.
Requested County	The county where the project is located.



Requested City	The city where the project is located.
Project Type	<p>Close: To shut down all operations at that location. No new space is required (e.g., all staff are fully remote or a program has ended).</p> <p>Consolidate: To close one or more existing locations and consolidate operations into a different existing location.</p> <p>Demolish: This project type is specific to state-owned facilities and is used when a building will be destroyed and removed from the state’s inventory.</p> <p>Dispose: Selling a facility to a non-state agency entity (i.e., removing the facility from the state's inventory) or transferring a facility to a different state agency.</p> <p>Major Improvement: A one-time cost exceeding \$250,000 to improve an owned or leased facility, not covered by another Action Type.</p> <p>New Space: A new space that is not currently part of an agency’s facilities inventory. May or may not involve relocating staff.</p> <p>Renew: Renewing in place with a change in square footage.</p>
Primary Space Type	<p>Space type that accounts for at least 60% of the total square footage.</p> <p>Office General (310): An office space housing staff, community volunteers, contractors, state agency partners or community partners working towards the agency mission in another capacity that does not fit within the criteria listed in the definitions for Administrative, Services, Field, and Project.</p> <p>Office Administrative (311): An office space housing staff primarily dedicated to administrative support for the agency mission. These offices typically have high telework eligibility. Examples include but are not limited to HR, IT, and Finance.</p> <p>Office Services (312): An office space housing staff primarily dedicated to direct delivery of services to the public. These offices typically have low telework eligibility. Examples include but are not limited to driver licenses examination facilities, unemployment benefit offices and community services offices.</p> <p>Office Project (313): An office space housing staff primarily dedicated to a major project in support for the agency mission. Examples include but are not limited to engineers, design teams and planning teams.</p> <p>Office Field (314): An office space housing staff primarily dedicated to conducting physical activities and processes in a specific area, outside the traditional office environment. These operations may have a minimal in-office component, such as reporting and other paperwork. Field offices typically have low telework eligibility. Examples include but are not limited to maintenance offices, oversight and support offices, program offices, and community offices.</p>
Secondary Space Type	Secondary space type if applicable, otherwise N/A.
Requested Lease Term	<p>The lease term in years.</p> <p>Note: A lease term greater than 10 years requires a life cycle cost analysis.</p>



Cancellation Clause	<p>Insert an X if a cancellation clause is required.</p> <p>Note: If a cancellation clause is required for this project, expect a higher cost for rent.</p>
Estimated Square Feet	Enter estimated square feet for project.
Will this project result in a change in square feet?	Choose from: Decrease, Increase, No Change
Estimated One-Time Costs	Enter estimated one-time costs for project.
Agency One-Time Cost Assumptions	Provide agency assumptions for estimated one-time costs.

SECTION THREE: PROJECT BUSINESS CASE AND ALTERNATIVES

Field	Description
Business Case	Please describe project rationale, including whether the project supports right-sizing office space.

PROJECT SCENARIOS

1. Agency is renewing and downsizing in place.
 - **ADP Action Type:** *Renew*.
 - **Project Request Form:**
 - Use the *Renew_Change in SQ FT* tab to capture one-time costs as well as changes to square footage and ongoing costs.

2. Agency is closing one existing facility and consolidating into a different facility that *is* part of the agency's current inventory.
 - **ADP Action Type** (for location that is closing): *Consolidate*.
 - **ADP Action Type** (for receptor site¹):
 - If staff are consolidating into an existing location and there is no change in square feet or one-time costs above \$250,000, choose *Renew* for a Leased Facility or *No Action* for an Owned Facility.
 - If the physical footprint of the receptor site is changing, choose *Renew*, complete the entire Planned Actions section of the ADP, and submit a Project Request Form.
 - If the receptor site square footage is not changing but there is a one-time cost that exceeds \$250,000, choose *Major Improvement*.
 - **Project Request Form(s):**
 - Use the *Consolidate_New Space* tab to capture project details for facility that is closing.
 - If there is also a project at the receptor site, submit a separate project request form (e.g., *Renew_Change in SQ FT* or *Major Improvement*).

3. Agency is closing two existing facilities and consolidating into a single facility that *is* part of the agency's current inventory.
 - **ADP Action Type** (for each location that is closing): *Consolidate*.
 - **ADP Action Type** (for receptor site):
 - If staff are consolidating into an existing location and there is no change in square feet or one-time costs above \$250,000, choose *Renew* for a Leased Facility or *No Action* for an Owned Facility.
 - If the physical footprint of the receptor site is changing, choose *Renew*, complete the entire Planned Actions section of the ADP, and submit a Project Request Form.
 - If the receptor site square footage is not changing but there is a one-time cost that exceeds \$250,000, choose *Major Improvement*.

¹ Receptor site refers to an existing owned or leased facility in an agency's portfolio that will absorb staff as part of a consolidation project.

- **Project Request Form(s):**
 - Use the *Consolidate_New Space* tab to capture project details for the facilities that are closing. List both UFI on the form.
 - If there is also a project at the receptor site, submit a separate project request form (e.g., *Renew_Change in SQ FT or Major Improvement*).
- 4. Agency is closing one existing facility and relocating to a facility that *is not* part of the agency's current portfolio.
 - **ADP Action Type** (for location that is closing): *New Space*.
 - **Project Request Form:**
 - Use the *Consolidate_New Space* tab to capture the New Space project details.
- 5. Agency is closing two existing facilities and relocating to a facility that *is not* part of the agency's current portfolio. Both facilities will close during the same fiscal year.
 - **ADP Action Type** (for each facility that is closing): *New Space*.
 - **Project Request Form:** Only one form is required.
 - Use the *Consolidate_New Space* tab to capture the New Space project details. Include both UFIs on the Project Request Form.
- 6. Agency is closing two existing facilities and relocating to a facility that *is not* part of the agency's current portfolio. The facilities will close during different fiscal years.
 - **ADP Action Type** (for location 1 that is closing): *New Space*.
 - **ADP Action Type** (for location 2 that is closing): *Consolidate*.
 - **Project Request Forms:** Submit two forms.
 - Use the *Consolidate_New Space* tab to capture project details for the New Space project.
 - Use the *Consolidate_New Space* tab to capture project details for the Consolidate project.
- 7. In phase one, an agency conducts a major improvement at a future receptor site. In phase two, the agency closes a location and consolidates into the receptor site. Projects are happening in different fiscal years.
 - **ADP Action Type** (receptor site): *Major Improvement*.
 - **ADP Action Type** (for location that is closing): *Consolidate*.
 - **Project Request Forms:** Submit two forms.
 - Use the *Major Improvement* tab to capture project details for the Major Improvement project.
 - Use the *Consolidate_New Space* tab to capture project details for the Consolidate project.