2019-25 Six-Year Facilities Plan & Data Instructions

RCW 43.82.035 directs the Office of Financial Management (OFM) to work with state agencies to determine the long-term facilities needs of state government and develop a Six-Year Facilities Plan that includes agency space requirements and other data necessary for cost-effective facility planning.

To support the development of the 2019-25 Six-Year Facilities Plan (Plan), each agency must validate, update and supply space use information for each in-scope facility. In-scope facilities are defined as:

- Leased and owned offices, hearings and conference rooms.

- Leased and owned storage, warehouse and information technology support facilities.

- Leased laboratories.

This data request supports the Plan by establishing a reliable baseline data set for office, support and leased laboratory space in the state of Washington. While this data is informative, the Plan's actions are not solely based upon the data. Creating the Plan is an iterative process between OFM and the agencies, based on agencies' current and changing business needs, workplace strategies and strategic plans.

The majority of the data required for this Plan was submitted by agencies for the previous plan, including occupancy and operating cost data. Previously, this data was collected using facility space use data sheets.

This Plan's baseline is data from the state's Facilities Portfolio Management Tool (FPMT). This new system has improved the accuracy of the state's facilities inventory by providing a stable platform to collect, validate and store data from all reporting state agencies.

If your agency has not used the FPMT system before, you may request access by emailing FPMTSupport@ofm.wa.gov. Additional information and assistance are available by contacting your facilities analyst listed on Page 3.

Reviewing Existing Agency Facilities Data

The FPMT has replaced the previous Excel reporting process for baseline data. All reported facilities as of September 2017 should be in the FPMT. Each agency must verify that the existing data for its facilities is correct. This data includes basic building data such as address, total square feet, and leased and owned information.


This information can be exported at the agency level by running either a Lease Contract Inventory report for leased facilities, an Owned Facilities Inventory report for owned facilities, or a Receivable Lease Inventory report for spaces leased from another state agency. This is done at the agency tile by opening the agency menu as shown above. We recommend that you download the report in Excel for readability.
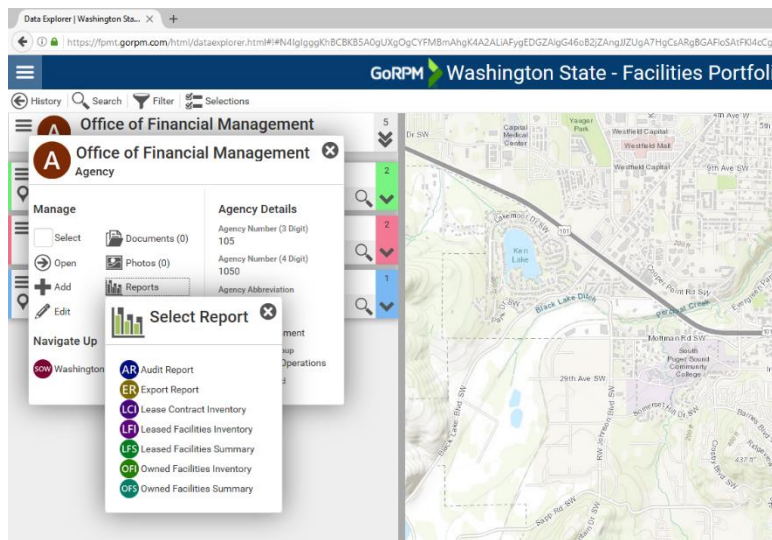
Six-Year Plan – Required Agency Facilities Data

Besides existing data, operating and some user data is required for the Plan. These fields are listed in the "Field by Field Instructions" with a brief explanation. However, the "Six-Year Facilities Plan" selection is a key field. This field must be selected for the facility to be in the Plan.

This field is located at the Leased Facility, Owned Facility or Receivable Leased Facility table, depending on the type of facility involved.
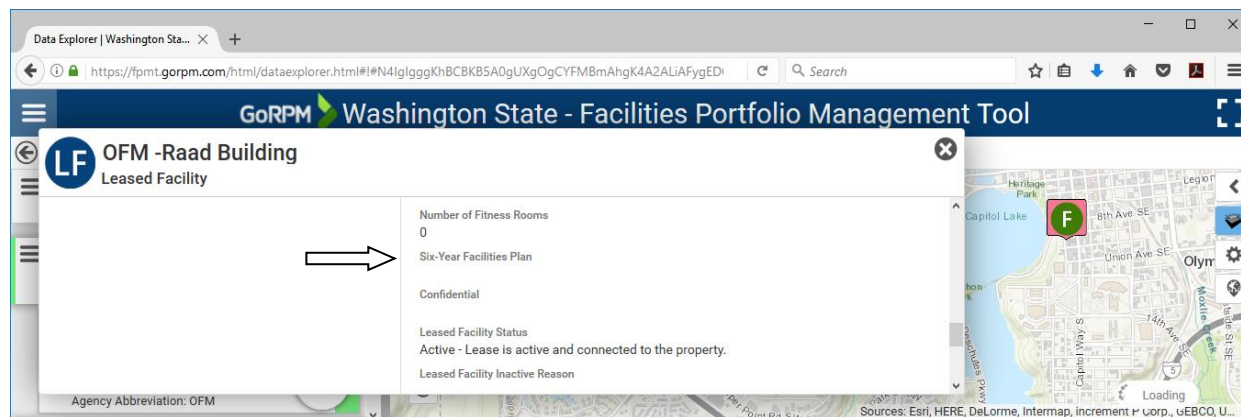
Only owned or leased facilities where the owning agency is also a tenant should have the facility selected as part of the Six-Year Facilities Plan. If the owning agency is not a tenant of the facility, the Six-Year Facilities Plan field should not be selected by the owning agency.

State tenants should select the Six-Year Facilities Plan field on the Receivable Facility table for it to show as part of their Plan.

Receivable Leases – Owned Building Leases and Subleases

A receivable lease is a lease agreement between the master state agency (either building owner/manager or master lessee) and another state agency tenant. For instance, DES manages the buildings on the Capitol campus and receives payment from state agency tenants. Or, DSHS leases a building and subleases space to DEL. Both of these types of leases, or agreements, are considered receivable leases. FPMT is designed to connect receivable leases to the main facility.

The master agency will input the receivable leases and spaces into the FPMT. Tenant agencies will complete the occupancy data fields such as user and workstation information. The tenant agency will also select if this space is part of the Six-Year Facilities Plan. (Refer to the Receivable Lease Instructions for inputting receivable lease information.)

Due Dates and Submission Process

Once the data in the FPMT is complete and verified, agencies will document their completion of the baseline information by emailing their baseline report to OFM in PDF format. This report is generated from the Agency tab, similar to the inventory reports.

Agency Six-Year Plan baseline reports are due via email to van.la@ofm.wa.gov by close of business on **Thursday, May 31, 2018**.

Agencies should continue to update the system with the latest owned and leased facility information (e.g., lease renewals) as soon as the agency has the appropriate facility information.

Contact Information

For questions about the six-year facilities plan and instructions or to provide feedback, contact your agency's assigned OFM Facilities Analyst:

Chuck McKinney	Kaye Foldvik	Scott Perkins
Facilities Analyst	Facilities Analyst	Facilities Analyst
chuck.mckinney@ofm.wa.gov	kaye.foldvik@ofm.wa.gov	scott.perkins@ofm.wa.gov
360-584-5039	360-810-0601	360-584-2307
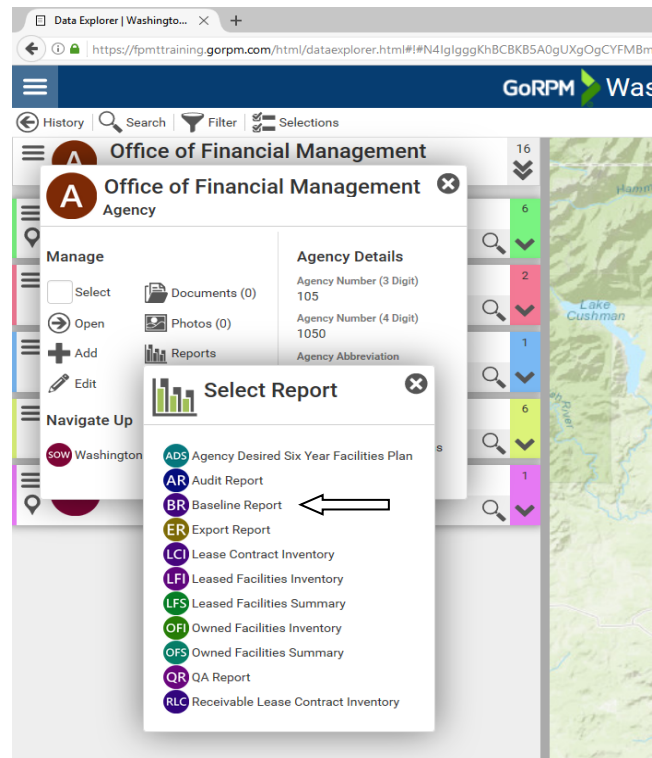
Field-by-Field Instructions

Six-Year Plan Facilities Information

These tables and fields are required data for Six-Year Planning. They are in addition to the minimum FPMT fields.

Six-Year Facilities Plan: If the facility is within the scope of the Six-Year Facilities Plan, this must be indicated in either the Leased Facility table, the Owned Facility table, or the Receivable Lease Facility table.

Debt Service Table: If the facility has debt service, this information needs to be filled out in the Debt Service Properties table. Refer to the FPMT instructions for adding debt service. This will typically consist of two payments per year.

Amortized Tenant Improvement Annual Cost: This information is added as a payment series in the Lease Payment table.

Operating Costs Data

Within the **Operating Costs Table** are the ongoing annual operating costs data fields. All costs are based on the fiscal year 2018 average. Only the applicable fields need to be filled out. Most facilities will not include all costs. If the agency does not pay for any of the operating costs, the field should be left blank.

- Parking annual cost
- Assessment annual cost
- Natural gas annual cost
- Electricity annual cost
- Garbage annual cost
- Insurance annual cost
- Janitorial annual cost
- Restroom supply annual cost

- Sewer annual cost
- Stormwater annual cost
- Property tax annual cost
- Water annual cost
- Recycling annual cost
- Maintenance and repair annual cost
- Other annual cost

Workspace Data

Within the **Space table** are the workspace and occupancy data fields.

Number of Offices: Provide the number of offices in the facility. An office is an enclosed unassigned or assigned space used by a resident user with floor-to-ceiling walls (typically 100 – 150 square foot room).

Number of Workstations: Provide the number of workstations for users in the facility. A workstation is an open or partially enclosed, unassigned or assigned space used by a resident or internally mobile user (typically 42 - 64 square feet).

Number of Mobile Benches (optional): If applicable, provide the number of mobile benches in the facility. A mobile bench is a workstation in a bench format, unassigned or assigned, used by an internally or externally mobile user (typically 24 - 36 square feet).

Number of Touchdown Spaces (optional): If applicable, provide the number of touchdown spaces in the facility. A touchdown space is an unassigned space that provides open seating in varying forms used by externally mobile users, remote users and visitors to conduct work on an irregular basis or for short periods (typically 24 square feet or less).

Occupancy or User Data

Within the **Space table** are the occupancy or user data fields.

The following fields are where the agency defines the type and quantity of users at this location. The User fields are intended to capture an estimate of how the space is being used. It is not intended to be an exact representation of daily use. The User fields should reflect how the facility is typically used on an annual basis.

A user is defined as any person who routinely works at a facility for any amount of time and may have an assigned workspace. A user could be an agency employee, volunteer, contractor or community partner. Users are not clients or customers. A user does not equate to an FTE.

If the agency is contractually obligated to a space or owns the space and there is no sublease to another entity, verify the number of users in that space. If there is a sublease, shared space agreement or memorandum of understanding with another state agency, the subleasing agency shall report its users separately.

Number of Resident Users: Populate the number of resident users of the facility. A resident user is a user who typically spends more than 50 percent of his/her time at the same workspace in the facility. Further identifying the number of users as either internally or externally mobile is optional at this time. However, if the other user types are not identified and filled in, include them in the total of all users in the Number of Resident Users field regardless of how much time they spend in the same workspace in the facility.

While not mandatory for this Plan, we encourage agencies to populate the additional FPMT user fields (number of internally mobile users and number of externally mobile users) in order to accurately examine how their facilities are being utilized. OFM anticipates this information will be required in future plans. Other data sources may be helpful in gathering this information, such as existing space planning data sheets, completed workplace surveys or staff located at the facility. The definitions of these users are as follows:

- Internally Mobile User: A user who typically spends more than 50 percent of his/her time in the facility with as much or more time spent away from their workspace than at it.

- Externally Mobile User: A user who spends at least 50 percent of his/her time outside the facility working in the field, from home or from other external locations.