

OFM

Facilities Planning

2020 Facilities Inventory & 2021-27 Six-Year Facilities Plan

Combined Instructions

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INTRODUCTION

Over the past year, OFM Facilities Planning has implemented a series of process improvements aimed at increasing data accuracy and program efficiency, including aligning the annual Statewide Facilities Inventory and biennial Six-Year Facilities Plan baseline data collection processes. Beginning this year, both processes will take place concurrently, eliminating a second data collection cycle in even-numbered years. OFM has also updated its [policies](#) to reflect new data and system access requirements.

This document provides combined instructions for both the Inventory and Six-Year Facilities Plan. For Inventory-only instructions, please click [here](#).

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. This data is used to develop a statutorily-mandated report to the Legislature, the following year's capital and operating budgets and the state's biennial Six-Year Facilities Plan.

For the purposes of the Statewide Facilities Inventory, a facility is defined as: *a building or other structure 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.

The Facilities Portfolio Management Tool (FPMT) serves as the system of record for Washington's inventory of state-owned and leased facilities. All facility data is collected and maintained in FPMT.

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 and expansion projects to downsizing and colocation with another agency. Thoughtful planning helps ensure better outcomes for agencies and improves efficiency and accountability across the enterprise.

Development of the Six-Year Facilities Plan is a two-stage process: baseline data collection and Agency Desired Plan (ADP) submittal. Inventory data, along with additional data points such as operating costs and workstation and occupancy counts, serve as the baseline. The ADP defines an agency's desired action, ranging from no action or renewal to relocation, expansion or major configuration, 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 space types for both owned and leased facilities are in scope for the 2021-27 Six-Year Facilities Plan:

Space Type	Space Type Number
Training Room	120
Departmental Classroom	130
Laboratory – General	210
Laboratory	270
Office – General	310
Office – Administrative	311
Office – Services	312
Office – Project	313
Conference Room	350

Out-of-Scope Facilities

Support spaces (property class 700 series) are out of scope for the 2021-27 Six-Year Facilities Plan. This is a change from the last biennial report. Additionally, the following facility types are out of scope for the plan:

- All Higher Education
- The School for the Blind and the School for the Deaf
- Washington State Parks and park facilities
- Washington State Commodity Commissions
- Owned Residential Police and Fire Training Facilities (WSP and CJTC)
- Owned Military Facilities
- Owned DNR Trust Assets
- Owned Historical Societies
- Fish Hatcheries and Wildlife Areas
- 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](#).

FPMT DATA REQUIREMENTS, REPORT SUBMISSION, AND DUE DATES

Overview

Now that data collection processes are aligned, agencies will make their inventory and Six-Year Facilities Plan FPMT updates concurrently. Facilities that are in scope for the Six-Year Facilities Plan have data requirements in addition to basic inventory data. The following requirements are new this year:

- All agencies are required to report condition assessment for all owned and leased facilities. This data is statutorily required per [RCW 43.82.150](#).
- For in-scope facilities, agencies must provide the following information, in addition to inventory requirements:
 - Operating costs (owned and leased facilities)
 - Debt service (owned facilities)
 - Workstation and occupancy data (owned and leased facilities)
 - New and/or updated receivable lease* information (owned and leased facilities)
 - Supporting lease and receivable lease documentation must be attached in FPMT

*A receivable lease is a lease agreement between an agency that owns a building or is the holder of the master lease and a tenant. For example, DSHS may sublease space to DCYF in certain facilities. The tenant could be another state agency or a non-governmental entity such as a nonprofit. The master lease holder/owning agency is responsible for entering most receivable lease data into FPMT. The tenant agency is responsible for reviewing and verifying the receivable lease information as well as reporting its workstation and occupancy counts.

Wizards

New user interfaces, also known as wizards, are now available for most business processes in FPMT. Wizards reduce manual activity by guiding users through each step of the process and automating steps like linking tables and changing table statuses. This simplifies the overall experience and supports reduction of data errors. Please refer to the [FPMT Combined Data Requirements Checklist](#) for a detailed overview of required system updates along with step-by-step instructions.

Data must be current as of June 30, 2020. For example, a lease that ends on June 30 should have an active status in FPMT. Please note that pending renewals are no longer available. Leases must be renewed on or after the new lease start date.

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

Data Validation

Agencies are expected to validate their data prior to submitting their Inventory and Six-Year Facilities Plan reports, and are required to run and review the system-generated QA report to check for, and correct, missing and/or invalid data. Please refer to OFM's [data validation instructions](#) for specific guidance on how to validate your data.

Reporting Requirements and Submission Process

After data is validated, each agency will download its [Owned and/or Leased Facilities Summary Reports](#), as applicable, and [Baseline Report](#) from FPMT in Excel format and email them to OFM at ofmfacilitiesoversig@ofm.wa.gov. This serves as your agency's official notice to OFM that your 2020 Facilities Inventory and 2021-27 Six-Year Facilities Plan baseline data are complete.

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

Report Due Date

All reports must be submitted to OFM by **Tuesday, June 23, 2020**. If reports have not been received by this date, agency leadership will be notified.

AGENCY DESIRED PLAN (ADP) AND DUE DATES

The ADP defines an agency's desired action for each in-scope facility for the time period covered by the plan. Agencies will download their Agency Desired Six Year Facilities Plan Report from FPMT and fill out the Planned Actions section for each facility, including: action type, date of action, projected square feet and projected users. The following action types are available in the 2021-27 Six-Year Facilities Plan:

- Cancel
- Close
- Demolish
- Dispose
- Downsize
- Expand
- Major Reconfiguration
- New Space
- No Action
- Relocate
- Renew
- Renew and Downsize
- Renew and Expand
- Renew and Major Reconfiguration

All planned projects require a [Project Request Form](#), which outlines business need as well as location, size and cost of the project. Agencies must also describe at least one alternative considered, such as doing nothing or renewing and expanding instead of relocating.

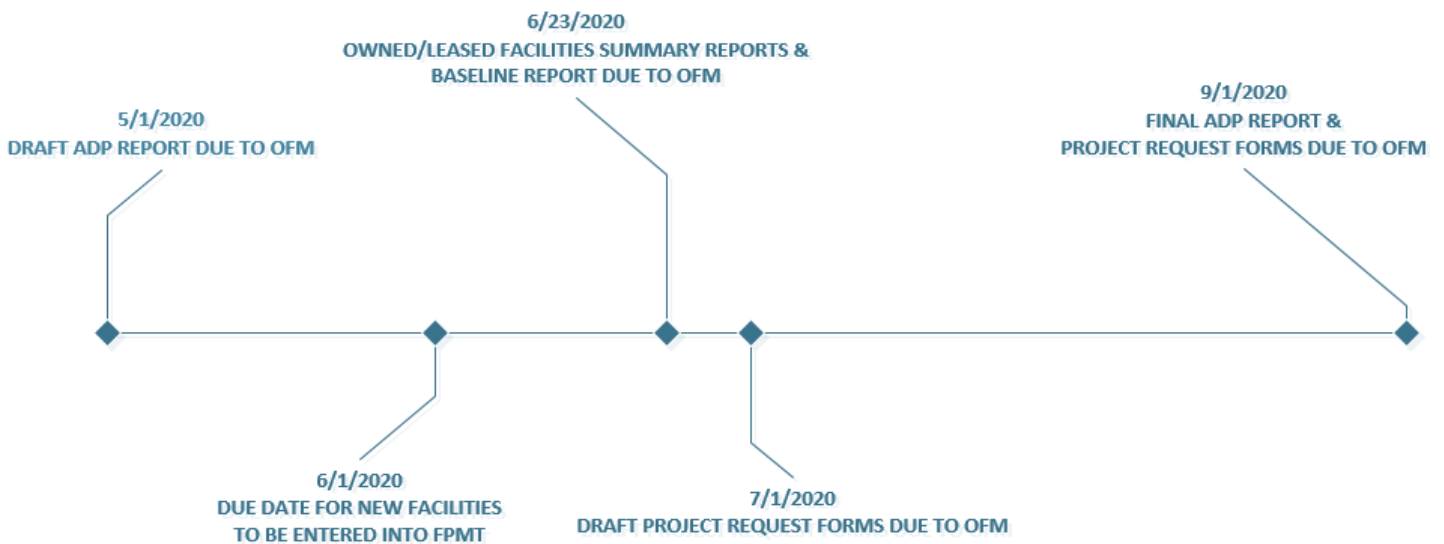
ADP reports and Project Request Forms should be submitted via email to OFM at ofmfacilitiesoversig@ofm.wa.gov. Refer to the [Agency Desired Plan job aid](#) for more detailed instructions.

ADP Due Dates

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

TIMELINE

Refer to the timeline below for a high-level overview of both data requirement and ADP due dates.



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.