

State of Washington
Office of Financial Management

2014 Facilities Inventory System Instructions

JUNE 2014



To accommodate persons with disabilities, this document is available in alternate formats by calling the Office of Financial Management at 360-902-0555. TTY/TDD users should contact OFM via the Washington Relay Service at 711 or 1-800-833-6388.

Visit our website at www.ofm.wa.gov

TABLE OF CONTENTS

Facilities Inventory System Report Overview	1
What's New in 2014	1
Due Dates and Submission Process	2
Contact Information	2
Section 1: System Hierarchy	3
Section 2: Field-by-Field Instructions for Owned Facilities	4
2.1 Owned Inventory Status	4
2.2 Property and Location Ownership	4
2.3 Agency Association	5
2.4 Property Site Data	5
2.5 Facility Measurements	6
2.6 Property Description	6
2.7 Property Zones	6
2.8 Property Designation	7
2.9 Facility Capital Data	7
2.10 Comments	7
Section 3: Field-by-Field Instructions for Leased Facilities	8
3.1 Leased Inventory Status	8
3.2 Property and Location Ownership	9
3.3 Agency Association	9
3.4 Property Site Data	10
3.5 Facility Measurements	10
3.6 Property Description	10
3.7 Property Zones	11
3.8 Property Designation	11
3.9 Lease Ownership Data	11
3.10 Lease Dates	12
3.11 Lease Financial Data	13
3.12 Lease Options	13
3.13 Parking	13

3.14 Standard Services Paid	13
3.15 Facility Comments	14
Appendix A: Definition of a Facility	15
Facilities to be Included	15
Facilities to be Excluded	15
Appendix B: Confidential Facilities	16
Appendix C: Property Class & Space Type Categories	17
Property Description Structure	17
Property Class	17
Primary Space Type	17
Secondary and Additional Space Type	17
Appendix D: Facility Square Footage Measurement	26
Appendix E: Condition Matrix	27
Appendix F: Inventory Status Scenarios	30

FACILITIES INVENTORY SYSTEM OVERVIEW

Facilities owned and leased by state agencies represent a significant financial investment by the citizens of Washington. Since 1997, [RCW 43.82.150](#) has required an annual inventory of these facilities. This inventory is called the Facilities Inventory System (FIS). It is one of several sources of information that support the Office of Financial Management's (OFM) oversight responsibilities for leased and owned facilities. The inventory provides information to the Legislature, various state agencies and other groups for budget development, strategic facilities planning, and facilities analysis and reporting functions.

The [2013 FIS Report](#) listed approximately 110 million square feet of facilities, both owned and leased, with more than 10,000 facilities reported by 80 different agencies. The 2014 FIS Report builds on the work accomplished in the 2013 report.

OFM appreciates each agency taking the time to provide a complete and accurate facility inventory.



WHAT'S NEW IN 2014

New System

Facilities Oversight, through the Department of Enterprise Services (DES)-Enterprise Technology Services, has acquired an online database that allows the state to automate facilities inventory reporting by state agencies and increase reporting functionality. To allow data to be migrated and stored in this system, the data submitted in the 2013 FIS Report have been further validated and expanded upon by OFM in partnership with agencies. In addition, OFM recently completed a validation of all facility location data. As a result, many facility records have been edited since the publication of the 2013 FIS data.

All data reported by agencies as a part of the 2014 FIS will be imported in the new system when it is returned to OFM. **Reporting data back to OFM in the prescribed format is critical to importing this data successfully.**

As in past years, after all agency data has been uploaded, OFM will conduct analysis on inventory counts, trends and yearly changes and prepare a demographic summary. This summary will be published and sent to the Legislature by Oct. 1, 2014. After the publication of the 2014 FIS Report, OFM will begin training agencies on accessing and using the FIS database. The new system will be accessible to agencies and provide mapping, reporting and importing functionality.

Reporting Required Data

The new FIS is a relational database with current and new data fields. As part of data migration and to minimize workload impacts, OFM has prepopulated data for agencies. Required fields in FIS now require data. **If required data fields are not populated, the record will be rejected by the system.** Rejection means an agency will need to review and verify incorrect or missing data for accuracy and completeness and resubmitted.

Required fields are denoted throughout the instructions with this symbol: 

If one of your facilities is confidential, refer to the [Appendix B](#) for submission details.

DUE DATES AND SUBMISSION PROCESS

Due Date for Small Agencies

Small agencies are defined as agencies with 25 or fewer facility assets. Both worksheets (sent as one Excel workbook) are due via email to laurie.wood@ofm.wa.gov by close of business **Friday, Aug. 1, 2014**.

Due Date for Large Agencies

Large agencies are defined as agencies with more than 25 facility assets. Both worksheets (sent as one Excel workbook) are due via email to laurie.wood@ofm.wa.gov by close of business **Monday, Aug. 25, 2014**.

CONTACT INFORMATION

For questions about the FIS process, instructions, or to provide feedback, contact an OFM staff member:

Josh Calvert
Facilities Analyst
josh.calvert@ofm.wa.gov
360-902-0548

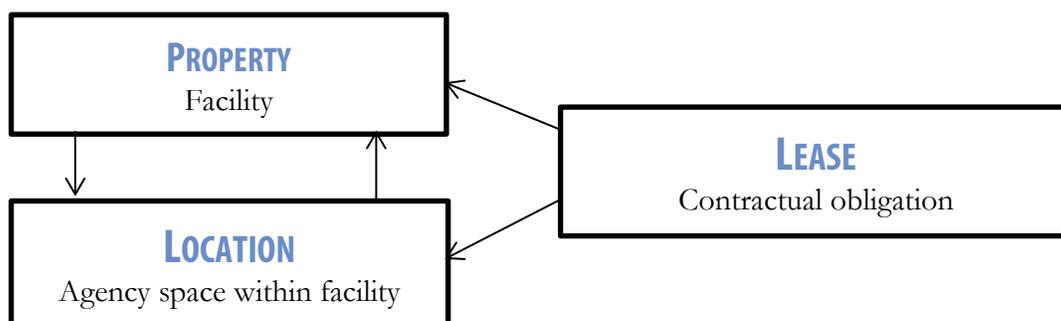
Laurie Wood
FIS/GIS Analyst
laurie.wood@ofm.wa.gov
360-902-0461

Amy McMahan
Senior Facilities Oversight Manager
amy.mcmahan@ofm.wa.gov
360-902-9824

SECTION 1: SYSTEM HIERARCHY

The new FIS database establishes a hierarchy that the state must follow to consistently gather the facilities inventory. This hierarchy is built from the property (real estate), the location (obligated space within) and, if applicable, the lease (contractual agreement tied to the obligated space). This hierarchy creates a single inventory record. Further definitions of this relationship are:

- ◆ **Property:** The real estate obligated to the state. A property must be reported to OFM if the type of property meets the facility definition. Property data includes the address, GIS coordinates, square footage, and other key site information.
 - **Facility:** A facility is a type of property in the new system. It is defined as a building or other structure with at least one wall, roof and permanent foundation, regardless of occupancy. It is the only type of property accepted in FIS 2014. Clarification on the definition of a facility is provided in [Appendix A](#).
- ◆ **Location:** A space obligated to an agency within the property. A location can represent all or a portion of a property. Location data include the agency occupying the space, condition, space types and agency crosswalk data. For FIS 2014:
 - **Owned Properties:** A location is equal to total obligated space for the agency that owns the property. There should be only one location for each owned property at this time.
 - **Leased Properties:** A location is equal to the space reported on each lease for the property. There may be multiple locations if more than one lease agreement is in place for the property.
- ◆ **Lease:** A contractual obligation for all or part of a property. Lease data include ownership information, start and end dates, financial obligations and options. For the 2014 FIS Instructions, a lease should be reported only if the lessor or sublessor is not a state agency. An example of a lease that is not reported is an agency tenant that occupies space in the GA Building, which is owned by DES.



SECTION 2: FIELD-BY-FIELD INSTRUCTIONS FOR OWNED FACILITIES

The field-by-field instructions move from the far left to right in an alphanumeric numbering format. Each row on the owned worksheet represents a record documenting one owned facility. The owned facility record is made up of property data and associated location data.

2.1 Owned Inventory Status

- ✦ A. **Property Status:** Validate or enter the property status. OFM has prepopulated all records as **Active**. See [Appendix F](#) for more information on status scenarios. Status options are:
 - ◆ **Active:** Property exists in the inventory. If an agency has made changes to an existing record, leave as “Active.” Changes will be identified through import to the database.
 - ◆ **New:** Property is a new agency submission to the inventory.
 - ◆ **Delete:** Property is no longer active and should be deleted from the agency’s inventory. Include a brief note indicating reason for deletion in the Comments field (see instructions for field AO). Examples of reasons are demolition, disposal or duplicate record.

- ✦ B. **Location Status:** Validate or enter the status of the space obligated the agency has within the property. See [Appendix F](#) for more information on status scenarios. OFM has prepopulated all records as **Active**. Status options are:
 - ◆ **Active:** Obligated space within the property exists. Changes will be identified through import to the database.
 - ◆ **New:** Obligated space within the property is new. If a new property is being added, the location status would be “New.” If property is “Active” and a new obligated location is being added, the location status would be “New.”
 - ◆ **Delete:** Obligated space within the property is no longer active and should be deleted from the agency’s inventory.

2.2 Property and Location Ownership

- ✦ C. **Unique Facility Identifier (UFI):** Do not edit. The UFI is provided for reference and is a key field in FIS that cannot be edited. Some UFIs were reassigned when data were migrated to FIS.

If the property is new, add a new record and leave the UFI field blank. The FIS will assign a UFI upon import.

- ✦ D. **Agency:** Validate or enter the [Agency Number](#) as defined in the SAAM table as a three-digit code without the final numeral 0 listed in the table (e.g., OFM = 105, not 1050).

- ✦ E. **Location Number:** Do not edit. The location number is provided for reference. This is a key field in FIS used to associate the obligated space to the agency within the property and cannot be edited. The number has been predefined for all existing properties as 0001.

If the location is new, leave blank. A number will be assigned by the system on import.

- F. **Location Description:** Validate, edit or enter the location description. This field has been prepopulated with the [agency SAAM acronym](#). Agencies are encouraged to make the location description unique, meaningful and descriptive of the space occupied. However, the description must begin with the SAAM acronym (e.g., DSHS-Community Services Office).

2.3 Agency Association

- G. **Agency Assigned Regional Name (optional):** Validate or enter the regional name for the property (e.g., SW Region).
- H. **Agency Assigned Regional Number (optional):** Validate or enter the regional number for the property (e.g., Region 6).
- I. **Agency Assigned Common Name (optional):** Validate or enter the common name given to the property (e.g., Othello Material Storage Building).
- J. **Agency Assigned Number (optional):** Validate or enter the numbering system for the property (e.g., Building 27).
- K. **Agency Assigned Associated Complex (optional):** Validate or enter the name of the associated property grouping. This could be a complex, campus or other property grouping (e.g., McNeil Island).

2.4 Property Site Data

- ✦ L. **Address 1:** Validate or enter the full legal address of the property (e.g., 909 NE Boat St). If the property has no address, enter the mile post number. Refer to the [USPS addressing standards](#). Legal address is defined as the local jurisdiction's address of record.
- M. **Address 2:** Validate or enter the secondary designation and unit number of the property if applicable (e.g., Suite 2, Room 403).
- N. **Alias Address (optional):** Validate or enter the full alternate known address for the property, if applicable (e.g., 909 NE Boat Drive, Suite 12).
- ✦ O. **City:** Validate or enter the legal city name for the property. If the property is outside of city limits, include the mailing address city.
- ✦ P. **County:** Validate or enter the county for the property. If the property is out of state, enter OSL (Out of State).
- Q. **State:** Validate or enter the state abbreviation for the property, if applicable.
- R. **ZIP code:** Validate or enter the five-digit ZIP code for the property, if applicable.
- S. **Country:** Validate or enter the country acronym for the property. Refer to [U.S. State Department](#) for a list of county acronyms.
- T. **Parcel Number:** Validate or enter the county parcel number for the property. This information is commonly found on a county assessor's website.
- U. **Latitude:** Do not edit existing records. These coordinates have been validated through the recent GIS project.

For new properties, enter coordinates for the GIS latitude coordinates in WGS Web Mercator format to six decimal points. Coordinates can be identified using a variety of free online applications, such as [ArcGIS Online](#). You will need to create an account and follow the online instructions to find latitude and longitude coordinates.
- V. **Longitude:** Do not edit existing records. Validate or enter the GIS longitude coordinates in datum WGS Web Mercator to six decimal points.

2.5 Facility Measurements

- ✦ **W. Square Feet:** Validate or enter the square footage of the property. Refer to [Appendix D](#) for measurement information.
- ✦ **X. Square Feet Type:** Validate or enter the measurement name used to identify the square feet. Choose between assignable, gross or non-assignable. Refer to [Appendix D](#) for measurement information.

2.6 Property Description

- ✦ **Y. Property Type:** Do not edit existing records. All properties in the current facilities inventory should have a property type of “Facility.” This value has been prepopulated.

If the property is new, enter “Facility” as the value for this field.

- ✦ **Z. Property Class:** Validate or enter the category name of the primary space type. This field has been prepopulated with the property class that is associated with the primary space type. Refer to [Appendix C](#) for Property Class categories.

- ✦ **AA. Primary Space Type:** Validate or enter the primary space type number of the obligated space within the facility. The primary space generally accounts for at least 60 percent of the total obligated space. Refer to [Appendix C](#) for space type descriptions.

AB. Secondary Space Type: Validate or enter the secondary space type number of the obligated space within the facility. The secondary space generally accounts for at least 20 percent of the total remaining use of the obligated space. Refer to [Appendix C](#) for space type descriptions.

AC. Additional Space Type: Validate or enter any additional space type numbers of the obligated space within the facility. The secondary space accounts for the remaining use of the obligated space. Refer to [Appendix C](#) for space type descriptions.

AD. Condition Matrix: Validate or enter the condition number of the facility. Refer to [Appendix E](#) for a description of the condition matrix.

2.7 Property Zones

AE. Legislative District: Do not edit existing records. Legislative district for all existing records have been validated.

If the property is new, enter the legislative district. Legislative district information is available at the [Washington State Legislature’s webpage](#). If out of state, enter Out of State.

- ✦ **AF. Homeland Security Region:** Do not edit existing records. Homeland Security Region for all existing records has been validated.

If the property is new, enter the Homeland Security Region where the property is located. Homeland Security region information can be found [here](#). If unknown, leave blank. If out of state, enter Out of State.

2.8 Property Designation

- AG. Essential Public Facility:** Validate or enter “Yes” or “No” if this facility meets the definition of essential public facility. The term “essential public facility” generally refers to public facilities that are typical to site and critical to state government. Refer to [WAC 365.196.550](#), [RCW 36.70A.200](#), [RCW 47.06.140](#) or [RCW 71.09.020](#).
- AH. Registered Historic Property:** Validate or enter “Yes” or “No” if the property is a registered national, state or local historic property. Refer to the [Department of Archeology and Historic Preservation](#) for more information.

2.9 Facility Capital Data

- AI. Date Constructed:** Validate or enter the date the facility was constructed. Use short date format (01/12/1999). If exact date is unknown, use an approximate date. If unknown or purchased, leave blank.
- AJ. Original Construction Cost:** Validate or enter the original cost of the construction for the facility. If unknown or purchased, leave blank.
- AK. Date Purchased:** Validate or enter the date the facility was purchased. Use short date format (01/12/1999). If exact date is unknown, use an approximate date. If unknown, leave blank.
- AL. Original Purchase Cost:** Validate or enter the original purchase cost of the facility. If unknown, leave blank.
- AM. Date Last Major Renovation:** Validate or enter the date of the last major renovation. Use short date format (01/12/1999). If exact date is unknown, use an approximate date. If unknown or not applicable, leave blank. A major renovation is defined as improvements to a major component of a facility where the cost exceeds 60 percent of the replacement value of a basic building component, such as the structural, HVAC or electrical systems.
- AN. Cost Last Major Renovation:** Validate or enter the total cost of the last major renovation to the facility. If unknown, leave blank.

2.10 Comments

- AO. Comments:** Enter comments relevant to the specific record. If the property status is “Delete,” a comment is **required** as noted in the instructions above (See A). Otherwise, this is an optional field where the agency may choose to provide information about the property or changes made to the record.

SECTION 3: FIELD-BY-FIELD INSTRUCTIONS FOR LEASED FACILITIES

The field-by-field instructions move from the far left to right in an alphanumeric numbering format. The leased facility record is composed of property data, associated location data and associated lease data.

3.1 Leased Inventory Status

- ★ **A. Property Status:** Validate or enter the property status. OFM has prepopulated all records as **Active**. See [Appendix F](#) for more information on status scenarios. Status options are:
 - ◆ **Active:** Property exists in the inventory. If an agency has made changes to an existing record, leave as “Active.” Changes will be identified through importation to the database.
 - ◆ **New:** Property is a new agency submission to the inventory.
 - ◆ **Delete:** Property is no longer active and should be deleted from the agency’s inventory. Include a brief note indicating reason for deletion in the Comments field (see instructions for field BS). Examples of reasons are demolition, disposal or duplicate record.

- ★ **B. Location Status:** Validate or enter the status of the space obligated to the agency within the property. See [Appendix F](#) for more information on status scenarios. OFM has prepopulated all records as **Active**. Status options are:
 - ◆ **Active:** Obligated space within the property exists. Changes will be identified through import to the database.
 - ◆ **New:** Obligated space within the property is new. If a new property is being added, the location status would be “New.” If property is “Active” and a new obligated location is being added, the location status would be “New.”
 - ◆ **Delete:** Obligated space within the property is no longer active and should be deleted from the agency’s inventory.

- ★ **C. Lease Status:** Validate or enter the status of the lease connected to the location. OFM has prepopulated all records as **Active**. See [Appendix F](#) for more information on status scenarios. Status options include:
 - ◆ **Active:** Lease that is “Active” and connected to the facility. **Reminder:** If the Lease Property Owner and/or Lease number are edited, you will need to set the old, out-of-date record to “Delete” and create a new record with all associated facility information and the updated lease information. The new record will have an “Active” status.
 - ◆ **New:** Lease is new to the property.
 - ◆ **Delete:** Lease is inactive, out of date and should be removed from “Active” status in the inventory. Include a brief note indicating reason for deletion in the Comments field (see instructions for field BT). Reasons for deletion include expired, canceled or duplicate record.



Important Lease Change



An agency adding a new lease to an existing property is required to create a new lease record with the property, location and associated lease information. An agency must indicate “Delete” on the old record and indicate “Active” on the new lease record. Only one active lease can be assigned to each agency location.

An agency editing the listed Lessor/Vendor is required to create a new record. The old lease record should have a “Delete” status and the record with the edited Lessor and/or Lease number should have an “Active” status. Both data elements are required keys in the new FIS database.

3.2 Property and Location Ownership

- ✦ **D. Unique Facility Identifier (UFI):** Do not edit. The UFI is provided for reference and is a key field in FIS that cannot be edited. Some UFIs were reassigned when data were migrated to FIS.

If the property is new, add a new record and leave the UFI field blank. FIS will assign a UFI upon import.

- ✦ **E Agency:** Validate or enter the [Agency Number](#) as defined in the SAAM table as a three-digit code without the final numeral 0 listed in the table (e.g., OFM = 105, not 1050).

- ✦ **F. Location Number:** Do not edit. The location number is provided for reference. This is a key field in FIS used to associate the obligated space to the agency within the property and cannot be edited. The number has been predefined for all existing properties as 0001.

If the location is new, leave blank. A number will be assigned by the system on import.

- G. Location Description:** Validate, edit or enter the location description. This field has been prepopulated with the [Agency SAAM acronym](#). Agencies are encouraged to make the location description unique, meaningful and descriptive of the space occupied. However, the description must begin with the SAAM acronym (e.g., DSHS-Community Services Office).

3.3 Agency Association

- H. Agency Assigned Regional Name (optional):** Validate or enter the regional name for the property (e.g., SW Region).
- I. Agency Assigned Regional Number (optional):** Validate or enter the regional number for the property (e.g., Region 6).
- J. Agency Assigned Common Name (optional):** Validate or enter the common name given to the property (e.g., Othello Material Storage Building).
- K. Agency Assigned Number (optional):** Validate or enter the numbering system for the property (e.g., Building 27).
- L. Agency Assigned Associated Complex (optional):** Validate or enter the name of the associated property grouping. This could be a complex, campus or other property grouping (e.g., McNeil Island).

3.4 Property Site Data

- ✦ **M. Address 1:** Validate or enter the full legal address of the property (e.g., 909 NE Boat St). If the property has no address, enter the mile post number. Refer to the [USPS addressing standards](#). Legal address is defined as the local jurisdiction’s address of record.
- N. Address 2:** Validate or enter the secondary designation and unit number of the property, if applicable (e.g., Suite 2, Room 403).
- ✦ **O. City:** Validate or enter the legal city name for the property. If the property is outside of city limits, include the mailing city.

- ✦ **P. County:** Validate or enter the county for the property. If the property is out of state, enter OSL (Out of State).
- Q. State:** Validate or enter the state abbreviation for the property, if applicable.
- R. ZIP code:** Validate or enter the five-digit ZIP code for the property, if applicable.
- S. Country:** Validate or enter the country acronym for the property. Refer to [U.S. State Department](#) for a list of county acronyms.
- T. Lease Address 1:** If distinctly different, validate or enter the address listed on the lease contract.
- U. Lease Address 2:** If distinctly different, validate or enter the secondary designation and unit number listed on the lease contract (e.g., Suite 3, Room 400).
- V. Lease City:** If distinctly different than the property address, validate or enter the city listed on the lease contract.
- W. Parcel Number:** Validate or enter the county parcel number for the property. This information is commonly found on a county assessor’s website.
- X. Latitude:** Do not edit existing records. These coordinates have been validated through the recent GIS project.

For new properties, enter coordinates for the GIS latitude coordinates in WGS Web Mercator format to six decimal points. Coordinates can be identified using a variety of free online applications, such as [ArcGIS Online](#). You will need to create an account and follow the online instructions to find latitude and longitude coordinates.
- Y. Longitude:** Do not edit existing records. Validate or enter the GIS longitude coordinates in datum WGS Web Mercator to six decimal points.

3.5 Facility Measurements

- ✦ **Z. Square Feet:** Validate or enter the amount of square feet of the obligated space within the property as specific on the lease contract. Refer to [Appendix D](#) for measurement information.
- ✦ **AA. Square Feet Type:** Validate or enter the measurement used to identify the square feet. Choose assignable, rentable, gross or non-assignable. Refer to [Appendix D](#) for measurement information.

3.6 Property Description

- ✦ **AB. Property Type:** Do not edit existing records. All properties in the current facilities inventory should have a property type of “Facility.” This value has been prepopulated.

If the property is new, enter “Facility” as the value for this field.

- ✦ **AC. Property Class:** Validate or enter the category name of the primary space type. This field has been prepopulated with the property class that is associated with the primary space type. Refer to [Appendix C](#) for Property Class categories.
- ✦ **AD. Primary Space Type:** Validate or enter the primary space type number of the obligated space within the property. The primary space generally accounts for at least 60 percent of the total obligated space. Refer to [Appendix C](#) for space type descriptions.

- AE. Secondary Space Type:** Validate or enter the secondary space type number of the obligated space within the property. The secondary space generally accounts for at least 20 percent of the total remaining use of the obligated space. Refer to [Appendix C](#) for space type descriptions.
- AF. Additional Space Type:** Validate or enter any additional space type numbers of the obligated space within the property. The secondary space accounts for the remaining use of the obligated space. Refer to [Appendix C](#) for space type descriptions.
- AG. Condition Matrix:** Validate or enter the condition number of the facility. Refer to [Appendix E](#) for a description of the condition matrix.

3.7 Property Zones

- AH. Legislative District:** Do not edit existing records. Legislative district for all existing records have been validated.

If the property is new, enter the legislative district. Legislative district information is available at the [Washington State Legislature’s webpage](#). If out of state, enter Out of State.

- ✦ **AI. Homeland Security Region:** Do not edit existing records. Homeland Security Region for all existing records has been validated.

If the property is new, enter the Homeland Security Region that the property resides within. Homeland Security region information can be found [here](#). If unknown, leave blank. If out of state, enter Out of State.

3.8 Property Designation

- AJ. Essential Public Facility:** Validate or enter “Yes” or “No” if this facility meets the definition of essential public facility. The term “essential public facility” generally refers to public facilities that are typical to site and critical to state government. Refer to [WAC 365.196.550](#), [RCW 36.70A.200](#), [RCW 47.06.140](#) or [RCW 71.09.020](#).
- AK. Registered Historic Property:** Validate or enter “Yes” or “No” if the property is a registered national, state or local historic property. Refer to the [Department of Archeology and Historic Preservation](#) for more information.



An agency editing the listed Lessor/Vendor or Lease Number is required to also create a new record. The old lease record should have a “Delete” status and the record with the edited Lessor/Vendor and/or Lease number should have an “Active” status. Both data elements are required keys in the new FIS database.

3.9 Lease Ownership Data

- ✦ **AL. Lessor/Vendor:** Validate or enter the full name of the legal Property Owner (Lessor). If unsure, enter TBD. A value is required for acceptance into the inventory.
- ✦ **AM. Lease Number:** Validate or enter the lease number assigned by General Administration/ Department of Enterprise Services (DES) or the agency/institution. A value is required for acceptance into the inventory.

Previous FIS records without a lease number were populated with the facility UFI and OFM (A01234 – OFM). If a record had a lease number but was a duplicate number of other submitted lease numbers, OFM added a letter or number to each duplicate lease. No duplicate lease numbers can be accepted in FIS.

It is strongly encouraged that agencies submit the current lease number. If the agency inventory has duplicate lease numbers or the agency is unsure on the lease number, alphanumerically make each lease record unique.

★ **AN. Lease Type:** Validate or enter the type of lease. Definitions for each possible value are listed below. If unknown, enter “Lease.”

- ◆ **Capital Lease:** A lease that transfers substantially all the benefits and risks inherent in the ownership of property to the state. Criteria are available in SAAM Policy 30.20.30.
- ◆ **Delegated Lease:** A lease where the authority to negotiate and execute the lease has been transferred from DES to another state agency consistent with RCW 43.82.010(12).
- ◆ **Delegated Sblse (short for Delegated Sublease):** A lease where authority to negotiate and execute a sublease is delegated from DES to another state agency consistent with RCW 43.82.010(12).
- ◆ **IAA/MOU (short for inter-agency agreement/memorandum of understanding):** A cooperative agreement between one or more agencies, units of government or other public sector entities that specifies the purpose, objectives, responsibilities and terms of agreement for the use or management of a facility.
- ◆ **Lease:** A contractual obligation for all or part of a property. This type of agreement is generally used when the state contracts with private lessors.
- ◆ **Licensed:** An agreement for a facility owned by an entity other than the state and used by the state through a license. This type of agreement is generally used by the Military Department when leasing from the federal government.
- ◆ **Sublease:** A lease of property or a portion of a property made by an entity that is a lessee or tenant of that property. For the 2014 FIS Instructions, a sublease should be reported only if the sublessor is not a state agency.

★ **AO. Real Estate Authority:** Validate or enter the real estate authority of the lease (DES, Agency or Higher Education). The real estate authority is the entity with the authority to acquire facilities through the negotiation of leases or similar contracts (see [RCW 43.82.010](#) for clarification).

3.10 Lease Dates

AP. Year First Leased: Validate or enter the four-digit year the property was first leased by the agency. If unknown, leave blank.

★ **AQ. Lease Executed Date:** Validate or enter the lease executed date. Use the short date format (e.g., 4/10/2012). If the lease executed date is unknown, enter the same date as the lease start date.

OFM has prepopulated with either data submitted from DES or copied over the lease start date.

★ **AR. Lease Start Date:** Validate or enter the lease start date. Use the short date format with the last two digits of the year (e.g., 4/10/2012).

- ✦ **AS. Lease Review Date:** Validate or enter the lease review date. Use the short date format with the last two digits of the year (e.g., 4/10/12). It is up to the agency’s discretion on when the appropriate review date is for lease renewal. If the lease review date is unknown, enter the date two years prior to the lease end date.
- ✦ **AT. Lease End Date:** Validate or enter the end date for the current lease term. Use the short date format with the last two digits of the year (e.g., 4/10/12). If the lease has no end date, enter 9/9/9999.

3.11 Lease Financial Data

- ✦ **AU. Payment Series:** Validate or enter a “1.” This number represents the number of different payment amounts being made to the monthly rent. For FIS 2014, only one payment series is being accepted. All payment series in FIS will be “1.” OFM has prepopulated all values as “1.”
- ✦ **AV. Payment Frequency:** Validate or enter the payment frequency. Choose among “Weekly,” “Monthly,” “Quarterly” or “Yearly.” The payment frequency indicates when rent is paid. OFM has prepopulated all values as “Monthly.”
- ✦ **AW. Base Rent:** Validate or enter the amount for rent in dollars and cents. If unknown, enter \$0.
- AX. Amortized Tenant Improvements Amount:** If applicable, validate or enter the total cost of tenant improvements, in thousand-dollar increments, that are obligated and amortized in the lease agreement. If unknown or not applicable, leave blank.

3.12 Lease Options

- AY. Cancellation Clause:** Validate or enter if the lease has a cancellation clause. If so, enter “Can Clause.” If unknown or not applicable, leave blank.
- AZ. Cancellation Clause Condition:** Validate or enter if the Cancellation Clause is based on condition. If so, enter “Yes.” If unknown or not applicable, leave blank.
- BA. First Date Cancellation Clause Useable:** Validate or enter the first date that the cancellation clause can be used in short date format. If unknown or not applicable, leave blank.
- BB. Option to Purchase:** Enter “Yes” if there is an option to purchase the leased facility in the current lease. Enter “No” if there are no options.

3.13 Parking

- BC. Parking Included in Lease:** Validate or enter if parking is included in the lease agreement. If so, enter “Yes.” If unknown or not applicable, leave blank.
- BD. Additional Spaces Leased:** Validate or enter if additional spaces are leased outside of the Location’s lease. If so, enter “Yes.” If unknown or not applicable, leave blank.

3.14 Standard Services Paid

For standard services related to the lease, enter or validate the responsibility of service with the following options:

- ◆ **Lessee Paid:** Agency pays for the service.
- ◆ **Lessee Paid via Reimbursement:** Landlord/vendor pays and is reimbursed for the service by the agency.
- ◆ **Lessor Paid:** Landlord/vendor pays for the service.
- ◆ If service is not an option, enter N/A.

- BE. Assessment:** Validate or Enter who pays for Assessment.
- BF. Bulbs/Tubes:** Validate or Enter who pays for Bulbs/Tubes.
- BG. Natural Gas:** Validate or Enter who pays for Natural Gas.
- BH. Electric:** Validate or Enter who pays for Electric.
- BI. Garbage:** Validate or Enter who pays for Garbage.
- BJ. Insurance:** Validate or Enter who pays for Insurance.
- BK. Janitorial:** Validate or Enter who pays for Janitorial.
- BL. Restroom Supply:** Validate or Enter who pays for Restroom Supply.
- BM. Sewer:** Validate or Enter who pays for Sewer.
- BN. Stormwater:** Validate or Enter who pays for Stormwater.
- BO. Property Tax:** Validate or Enter who pays for Property Tax.
- BP. Water:** Validate or Enter who pays for Water.
- BQ. Recycling:** Validate or Enter who pays for Recycling.
- BR. Other:** Validate or Enter who pays for other services.

3.15 Facility Comments

- BS. Property Comments:** Enter comments relevant to the specific record. If the property status is “Delete,” a comment is **required** as noted in the instructions above (see A). Otherwise, this is an optional field where the agency may choose to provide additional information about the property or changes made to the property record.
- BT. Lease Comments:** Enter comments relevant to the specific record. If the lease status is “Delete,” a comment is **required** as noted in the instructions above (see C). Otherwise, this is an optional field where the agency may choose to provide additional information about the lease or changes made to the lease record.

APPENDIX A: DEFINITION OF A FACILITY

A facility is defined as the combination of property, location and pertinent lease information. In FIS 2014, a facility is defined as a building or other structure with at least one wall, a roof and a permanent foundation, regardless of occupancy. It is the only type of property accepted in FIS 2014.

Facilities to Be Included

All occupied, vacant or abandoned facilities are to be inventoried. Minor facilities should be included in the inventory if all the following criteria are met:

- ◆ Under 24-hour, seven-days-per-week jurisdiction of an agency;
- ◆ Permanently attached to a foundation;
- ◆ Roofed and have one wall; and
- ◆ Have a square footage value greater than zero.

Facilities to Be Excluded

Structures with any of the following features are excluded from the inventory:

- ◆ No permanent foundation
- ◆ No roof
- ◆ No walls
- ◆ Components of the transportation system such as roads, bridges, tunnels and mechanical rooms that are built into bridges and tunnels, and parking areas (land).
- ◆ Components of a utility system such as power generating facilities (dams, gas or oil fire electrical power plants), electrical vaults, utility tunnels, water systems (towers, tanks or reservoirs) and communication towers.
- ◆ Other similar improvements to real property such as fuel tanks, soil bins, solar panels placed on land and temporary shelters without permanent foundations.

Inventory this: a permanent information booth that is roofed, walled and attached to a foundation.

Do not inventory this: a job shack, which is roofed, walled and temporarily attached to a sidewalk or parking lot with utility service.

APPENDIX B: CONFIDENTIAL FACILITIES

All state agencies are required under RCW 43.82.150 (2) to provide OFM with a complete inventory of owned and leased facilities in a standard format prescribed by OFM. Agencies that have confidential facilities are advised to consult with OFM before submitting a confidential facility inventory report.

At a minimum, the following information would need to be submitted for a confidential facility:

- ◆ A separate FIS Excel worksheet clearly marked as “Confidential,” documenting the confidential facility.
- ◆ A statement why this facility location information needs to be held in a confidential file.
- ◆ A citation of the law(s) supporting non-disclosure.

APPENDIX C: PROPERTY CLASS & SPACE TYPE CATEGORIES

Property Description Structure

The 10 major series numbers of spaces are intended to provide flexibility in coding space use at the agency level and to provide appropriate comparability in reporting space uses statewide.

The words *space* and *room* could be used interchangeably. For example, wherever space type codes are mentioned, they are called “space use codes.” When space use could be either in a *room* or a *space*, the term *space* is used.

Property Class

The property class is the space type series that the primary space type falls under. An example would be an agency having a primary space as classroom. This space type is in the Education series. Refer to the Space Type chart on page 21 for categories of Property Classifications.

Primary Space Type

Most locations that an agency manages fall readily into one primary space type. FIS defines primary use as more than 60 percent of the space dedicated to one space type. A space that is used as both an Office (310) and a Laboratory (270) and used principally for laboratory testing should be coded as Laboratory. A space that appears or is designed for storage or warehousing but is used primarily as an office (60 percent or more) should be coded as an office.

If a space has no dominate use, such as 40 percent Office Administrative (311), 40 percent Laboratory (270) and 20 percent Storage/Warehouse (730), it is recommended that agencies evaluate the space use in terms of the human activity element that focuses on primary use rather than percentage of space use by each category.

Secondary and Additional Space Type

Secondary and one Additional Space Type field are provided as optional fields in FIS.

Property Class	Space Type
100 Educational	110 Classroom
	120 Training Room
200 Laboratory	270 Laboratory
300 Office	310 Office General
	311 Office Administrative
	312 Office Services
	313 Office Project
	350 Conference Room
400 Study	410 Study Space
	420 Library
500 Special Use	502 Hearing Room
	503 Correction
	504 Military Department/National Guard
	505 Fish Hatchery
	506 Park
	507 Ferry Terminal
	508 Public Restroom
	510 Armory
590 Other (purpose defined when used)	
600 General	650 Lounge
	680 Meeting Room
	710 IT and Communications
700 Support	720 Shop
	730 Storage/Warehouses
	740 Vehicle Storage Facilities
	750 Central Service
	790 Central Utility Plant
800 Health Care	800 Includes Patient Room, Nurse Station, Surgery, Treatment/ Examination, Diagnostic, Public Waiting
900 Residential	900 Includes Sleeping Room, Apartments, House, etc.
000 Unclassified	050 Inactive Space
	060 Alteration or Conversion Space
	090 Vacant Unusable Space

100 Series: Educational

The 100 category aggregates classroom and training facilities as an institution/agency-wide resource, even though these areas may fall under different levels of organizational control. The term “classroom” includes not only general purpose classrooms, but also lecture halls, recitation rooms, seminar rooms and other spaces used primarily for scheduled non-laboratory instruction. The category Classroom (110) is for degree-granting instruction. The term “training room” includes all the same types of space as classrooms where training programs are conducted.

110 Classroom

Definition: A room or space used primarily for instruction classes and is not tied to a specific subject or discipline by equipment in the room or the configuration of the space.

Description: Includes rooms or spaces generally used for scheduled instruction that require no special restrictive equipment or configuration. These spaces may be called lecture rooms, lecture-demonstration rooms, seminar rooms and general purpose classrooms. A classroom may be equipped with tablet armchairs (fixed to the floor, joined in groups or flexible in arrangement), tables and chairs (as in a seminar room) or similar types of seating. These spaces may contain multimedia or telecommunications equipment. A classroom may be furnished with special equipment for a specific area of study if this equipment does not render the space unsuitable for use by classes in other areas of study.

Limitations: This category does not include Training Rooms (120), Class Laboratories (210), Conference Rooms (350), Auditoria (610) or Meeting Rooms (680). If a space is restricted to a single or closely related group of disciplines by special equipment or its configuration, it may be logically considered as a laboratory (see Code 200 series).

120 Training Room

Definition: A space serving an office and used primarily for staff and public training activities and is not tied to a degree-granting educational program.

Description: Includes rooms or spaces generally used for scheduled training that require no special restrictive equipment or configuration. These spaces may contain multimedia or telecommunications equipment. A training room may be furnished with special equipment specific to the agency work if this equipment does not render the space unsuitable for use by others in the facility.

Limitations: This category does not include Classroom (110), Laboratories (270), Conference Rooms (350), Agency Lounge (650) or Meeting Rooms (680).

200 Series: Laboratory

A laboratory is a facility characterized by special purpose equipment or a specific space configuration that limits the space use. An agency may have very limited laboratory space or the laboratory activities may define the agency.

270 Laboratories

Definition: A space used for laboratory experimentation, research or testing.

Description: A laboratory is designed or equipped for staff to conduct research and testing in a controlled or structured environment. Activities may include experimentation, application, observation, composition or research in a structured environment, as directed by the agency.

Limitations: This category does not include educational Class Laboratory (210), Open Laboratory (220) and Research/Non-class Laboratory (250).

300 Series: Office

Office facilities are individual, multi-person or workstation spaces specifically assigned to the agency's administrative, service and support functions.

310 Office General

Definition: A space housing staff, community volunteers, contractors, state agency partners or community partners working at one or more desks, tables or workstations.

Description: An office is typically assigned to one or more persons as a station or work area. It may be equipped with desks, chairs, tables, bookcases, filing cabinets, computer workstations, microcomputers or other office equipment.

Limitations: Any other spaces, such as shops, printing shops, study rooms, training rooms, laboratories, etc., that incidentally contain desk space for a technician or staff member are classified according to the primary use of the space, instead of as an office. Office areas do not need to have clearly visible physical boundaries. In such cases, logical physical boundaries (phantom walls) may be assigned to calculate square footage.

311 Offices Administrative

Definition: An office space housing staff primarily dedicated to administrative support for the agency mission.

312 Office Service Deliver

Definition: An office space housing staff primarily dedicated to direct delivery of human services. Examples include driver licenses examination facilities, unemployment benefit offices and public health offices.

313 Office Project Deliver

Definition: An office space housing staff primarily dedicated to a major project in support for the agency mission. Examples include engineers, design teams and planning teams.

350 Conference Room

Definition: A space serving an office complex and used primarily for agency-wide staff meetings and public activities.

Description: A conference space equipped with tables and chairs and typically providing additional parking. Normally it is used by a specific organizational unit or office area, whereas Meeting Rooms (680) are used for general purposes meetings. If a space is used for both conference and meeting space functions, then the space should be classified according to its primary use.

Limitations: Does not include Classrooms (110), Training Rooms (120) and Meeting Rooms (680).

400 Series: Study

Study spaces may contain equipment or materials that aid the study or learning process (e.g., computers, reference material, records and tapes) and that do not restrict the space.

410 Study Space

Definition: A room or area used by individuals to study with the space not being restricted.

Description: Includes study or reading rooms located in libraries, residential facilities, academic study carrels and booth areas. Study stations may be grouped as in a library reading room or individualized as in a carrel. Study spaces are primarily used by staff for learning at their convenience, although access may be restricted by management.

Limitations: This category excludes Laboratories (270) that are restricted to a particular use and Lounges (650) that are intended for relaxation and casual interaction.

420 Libraries

Definition: A space used to house arranged collections of educational materials for use as a study resource.

Description: Agency or departmental libraries and are characterized by accessible, arranged and managed collections. Collections can include books, periodicals, journals, monographs, electronic storage media (such as tapes, disks, slides, etc.), musical scores, maps and other educational materials.

Limitations: Does not include general storage areas for materials that serve a particular room or area. Such spaces would take the service code Storage/Warehouse (730).

500 Series: Special Use

This category includes space uses that are sufficiently specialized in their primary activity or function to merit a unique space code. Although many of these special spaces provide service to other areas, their special use or configuration dictates use of an individual category.

502 Hearings

Definition: A hearing room is a facility characterized by specific space configuration or special purpose equipment that limits the use of the space to hearing activities or closely related activities.

Description: Hearing room activities may include judicial hearings (all levels), formal hearings and informal hearings. They may be equipped with special desks, chairs, tables, bookcases, filing cabinets, computer workstations, microcomputers or other office equipment.

Limitations: Any other spaces such as meeting rooms, study rooms or offices that are occasionally used as hearing rooms are classified according to the primary use of the space rather than as a hearing room. Hearing rooms do not include Classroom (110), Training Room (120), Office (310), Study Space (410), Library (420), Lounge (650) or Meeting Room (670).

503 Corrections

Definition: A building, room or area used by the Department of Corrections for people who are judicially ordered to be kept in custody.

Description: Building, room or area that has a secure boundary maintained by the Department of Corrections.

Limitations: Conventional space use types such as Classrooms (110), Training (120), Laboratories (270), Offices (310), Study Space (410), Library (420), Lounge (650) or Meeting Room (670) are designated as such, even though they are located on Department of Corrections' property.

504 Military

Definition: A building, room or area used by Washington National Guard and ancillary units for military training and/or instructional activities.

Description: Spaces that are designed or equipped for use in a military training or instructional program, such as indoor drill areas, indoor rifle ranges and specially designed or equipped military science rooms, are included in this category. Ancillary units may include special rifle and drill teams.

Limitations: Conventional space use types such as Classrooms (110), Laboratories (270), Offices (310) and Study Rooms (410) are designated as such even though they are located on military property.

505 Fish Hatchery

Definition: A building, pods or tanks used primarily for raising fish.

Description: Spaces that are obviously designed or equipped for use as fish hatcheries, such as indoor pods or tanks, outdoor pods and specially designed buildings.

Limitations: Conventional space use types such as Classrooms (110), Laboratories (270), Offices (310) and Residential Facilities (900) are designated as such even though they are located at a fish hatchery.

506 Park

Definition: A building, shelter or facility used primarily by the public at a state park.

Description: Spaces that are obviously designed or equipped for public use, such as picnic shelters, comfort stations, wood sheds and specially designed buildings.

Limitations: Conventional space use types such as Office General (310), Shop (720) and Residential Facilities (900) are designated as such even though they are located at a state park.

507 Ferry Terminal

Definition: A building, shelter or facility used primarily by the public for vehicles/passage loading and unloading.

Description: Spaces that are obviously designed or equipped for public use, such as tollbooths, waiting areas, comfort stations and specially designed buildings.

Limitations: Conventional space use types such as Office General (310), Shop (720) and Residential Facilities (900) are designated as such even though they are located at a ferry terminal.

508 Public Restroom

Definition: A building, shelter or facility used primarily by the public.

Description: Spaces that are obviously designed or equipped for public use, such as highways, parks and public venues restrooms.

Limitations: Used primarily by the public even though they are located in facilities with different primary use.

590 Other (purpose defined when used)

Definition: A category of last resort.

Description: Included as a category of last resort to be used only for those spaces or facilities that cannot be described with other codes and definitions.

Limitations: Should have very limited use, if used at all.

600 Series: General Use

General use facilities are characterized by their broader availability to staff and/or the public than are Special Use Facilities (500 series), which are typically limited to unique function or special populations. General Use Facilities comprise support space such as lounge, recreation and general meetings space for the agency and/or public.

650 Lounge

Definition: A space used for rest and relaxation that is not restricted to a specific group of people, unit or area.

Description: A lounge facility is typically equipped with furniture, tables and chairs, and may include vending machines. If a space is equipped with more than one or two seats for a seating area and intended for use by people visiting or passing through a building or area, it is coded as a Lounge (650). Such a space may have vending machines even though the primary use of the space is rest, relaxation or informal socializing.

Limitations: A lounge facility is distinguished from a Conference Room (350) and a Meeting Room (680), both of which are intended for formal meetings, by its more informal function of rest, relaxation or casual interaction and its public availability.

680 Meeting Room

Definition: A room that is used by the agency or the public for a variety of meetings.

Description: The key concept here is availability. Conference Rooms (350) are often confused with Meeting Rooms because they are both used for meetings. However, conference spaces have visitor parking components for a building or complex. Although Meeting Rooms may be assigned to a specific organizational unit, a meeting space is more available and open to staff groups.

Limitations: Spaces serving a headquarter complex and used primarily for agency-wide staff meetings are classified as Conference Room (350). Training rooms used primarily for scheduled class, training and seminars are classified as Training Rooms (120).

700 Series: Support

Support facilities provide centralized space for various auxiliary support systems and help keep all agency programs and activities operational. While not as directly accessible to agency and community members as General Use Facilities (600 series), these areas provide a continuous, indirect support system to administration, staff and the public. Support facilities are centralized in that they typically serve an area ranging from a building to an entire region. Included are centralized areas for computer-based data processing and telecommunications, shop services, general storage, and supply and vehicle storage.

710 Central Computer or Telecommunications

Definition: A space used as a data or telecommunications center with applications that are broad enough to serve the overall administrative needs of a central group of users, department or agency.

Description: A central computer or telecommunications room or a secured, compartmented information facility may be one of a group of spaces that constitute a center for delivering data processing or telecommunications services to various levels of user groups.

Limitations: Does not include Office (310) space assigned to programmers, analysts, engineers, data entry personnel and other technical staff even though these spaces usually contain an access terminal. Also does not include Laboratory (270), Study Room (410) or offices with data processing equipment used as office tools. Personal computer, terminal work spaces, printer rooms and data closet that serve an office area should be coded Office General (310).

720 Shop

Definition: A space used for the manufacture, repair or maintenance of products and equipment.

Description: Includes carpenter, plumbing, HVAC, electrical and painting shops, and similar physical plant maintenance facilities. This category also includes centralized shops for construction, repair and maintenance of equipment and devices. Special purpose shops supporting multiple spaces for scientific instruction and research are included in this category.

Limitations: Does not include architectural and engineering drafting rooms serving the facilities management operation, which are classified as Office (310). This category also does not include areas used for the repair and maintenance of agency-owned vehicles, which are Vehicle Storage (740).

730 Storage/Warehouse

Definition: A space or building that is used to store equipment or materials and that serves multiple space use categories, organizational units or buildings.

Description: The concept of storage is central to applying this code correctly. The majority of storage spaces are service rooms that directly support a primary activity of the agency; for example, a furniture storage room serving several Offices (310). Central storage areas include areas commonly called warehouses, surplus storage, central storage and inactive storage. A storage space used to store bulk janitorial supplies would be included in this category.

Limitations: Does not include a storage space directly serving a primary space such as Office (310). Also, this category does not include custodial supply closets or other similar, non-assignable small storage spaces.

740 Vehicle Storage Structure

Definition: A structure that is used to house or store vehicles.

Description: Includes structures and buildings generally called parking decks, garages, boathouses and airplane hangars. The definition of “vehicle” is broadly interpreted here to include forklifts, moving equipment, lawn equipment and other powered transport devices or equipment, as well as automobiles and trucks.

Limitations: This category does not include surface parking lots.

750 Central Service

Definition: A room or area that is used for the processing, preparation or delivery of agency-wide support service.

Description: The central service area includes centralized stores and laundries that typically serve the occupants or activities of more than one building. Also includes central facilities for printing and duplicating services, central mail facilities, central shipping and receiving areas, and central environmental testing or monitoring facilities if they serve the occupants and activities of more than one building.

Limitations: Does not include those spaces providing the above-listed functions if they support other primary activity spaces in the same building. For example, a storage area in an office should be coded as Office (310). Facilities used for the manufacture, repair, or maintenance of products or equipment should be coded Shop (720), Central Storage (730) and Vehicle Storage (740).

790 Central Utility Plant

Definition: A facility that primarily houses central utility production and/or distribution to more than one facility at a complex, campus or regional center. These include such facilities as steam plants, cogeneration facilities and electrical distribution facilities.

Description: Spaces that are obviously designed or equipped for distribution of energy.

Limitations: Conventional space use types such as Office General (310), Conference Rooms (350) or Shop (720) and are designated as such even though they are located in a Central Utility Plant.

800 Series: Health Care

At this time there is no delineation of categories for health care facilities. The 800 series includes all patient care areas that are located in separately organized and budgeted health care facilities: infirmaries, hospitals and stand-alone clinics that are run by agencies.

900 Series: Residential

At this time there is no delineation of categories for residential facilities. Residential facilities include housing for staff, patients, inmates and visitors. Note: Not all space in residential facilities is categorized using the 900 series. Conventional primary activity and service categories such as Training Rooms (120), Offices (310), Study Rooms (410), Lounges (650) and Recreation (670) are not included in the 900 series.

000 Series: Unclassified

Unclassified facilities include those assignable areas that are inactive or unassigned, in the process of being altered, renovated or converted, or in an unfinished state.

050 Inactive Spaces

Definition: Assets available for assignment but unassigned at the time of inventory.

Limitations: This category does not include space being modified or space that is unusable.

060 Alteration or Conversion Spaces

Definition: Assets temporarily out of use because they are being altered, remodeled or rehabilitated at the time of inventory.

Limitations: This category does not include space that is inactive or space that is unusable.

090 Vacant Unusable Spaces

Definition: Assets unusable at the time of inventory.

Limitations: This category does not include inactive space or space temporarily under conversion.

APPENDIX D: FACILITY SQUARE FOOTAGE MEASUREMENT

In an inventory system, it is important to have a common measurement unit to make effective comparisons. Unfortunately, there are no common measurement units for owned and leased buildings at this time. FIS uses several measurement types: gross, assignable, non-assignable and rentable square feet.

Owned facilities will typically be measured in gross square feet but can also be measured in assignable and non-assignable square feet.

Leased facilities will typically be measured in rentable square feet but can also be measured in gross, assignable and non-assignable square feet.

- Gross Square Feet:** The total constructed square footage of a building is the sum of all spaces on all floors of a building measured to the exterior enclosing walls.
- Rentable Square Feet:** The tenant's prorated portion of the floor, excluding major vertical penetrations. Typically, this is the square footage report on the lease.
- Non-Assignable Square Feet:** The area that is not occupied by agency personnel or furnishings, and consists of mechanical rooms, toilets, custodial rooms, general circulation space, stairs and elevators.
- Assignable Square Feet:** A measurement used to describe the office, storage, special and internal circulation areas assigned to an occupant.

APPENDIX E: CONDITION MATRIX

As owned or leased facilities age, they increasingly require more attention to maintain. To help planners organize their efforts, the FIS condition matrix was developed to provide a facility conditions assessment tool for agencies. A detailed facility condition assessment consists of measuring all major facility asset components and translating the inspection data into a meaningful condition metrics. These are then used to support the asset management decision making. The FIS condition matrix is not a substitute for this detailed building condition assessment process.

The FIS condition matrix provides nine categories to evaluating each facility:

- ◆ Facility Support and Response Time – facility staff support and response time to request.
- ◆ Satisfaction – agency satisfaction with facility.
- ◆ Preventive vs. Corrective Maintenance – to what degree is maintenance addressed in a preventive vs. corrective manner.
- ◆ Maintenance – response to preventive, reactive and emergency maintenance.
- ◆ Interior – aesthetic assessment of interior finishes.
- ◆ Exterior – aesthetic assessment of exterior finishes.
- ◆ Lighting – aesthetic assessment of lighting.
- ◆ Service Efficiency – service and maintenance call evaluation.
- ◆ Building System Reliability – evaluation of system breakdowns and repairs.

Agencies need to rank their facility conditions on a 1 to 5 scale. The condition matrix below is optional. The evaluator is asked to rank each category by placing an X in one of the five levels. The level receiving the most Xs is the condition to report in FIS.

Level	1 Superior	2 Adequate	3 Fair	4 Limited	5 Emergent
Facility Support and Response Time					
Satisfaction					
Preventive vs. Corrective Maintenance					
Maintenance					
Description					
Interior					
Lighting					
Service Efficiency					
Building Systems Reliability					

Level	1	2	3	4	5
Description	Superior	Adequate	Fair	Limited	Emergent Services Only
Facility Support and Response Time	Able to respond to virtually any type of service; immediate response.	Response to most service needs, including limited non-maintenance activities, is typically in a week or less.	Services available only by reducing maintenance, with response times of 1 month or less.	Services available only by reducing maintenance, with response times of 1 year or less.	Services not available unless directed from top administration; none provided except in emergencies.
Satisfaction	Proud of facilities; have a high level of trust for the facilities organization.	Satisfied with facilities-related services, usually complimentary of facilities staff.	Accustomed to basic level of facilities care. Generally able to perform mission duties. Lack of pride in physical environment.	Generally critical of cost, responsiveness and quality of facilities services.	Consistent customer ridicule, mistrust of facilities services.
Preventive vs. Corrective Maintenance	100%	75–99%	50–74%	25–49%	<25%
Maintenance	All recommended preventive maintenance (PMs) are scheduled and performed on time. Reactive maintenance (spot re-lamping and adjusting door closers) is minimized to the unavoidable or economical. Emergencies (storms or power outages) are very infrequent and handled efficiently.	A well-developed PM program: most required PMs are done at a frequency slightly less than per defined schedule. Appreciable reactive maintenance required due to systems wearing out prematurely and high number of lamps burning out. Occasional emergencies caused by pump failures, cooling system failures, etc.	Reactive maintenance predominates due to systems failing to perform, especially during harsh seasonal peaks. An effort still made at PM: priority to schedule as time and manpower permit. The high number of emergencies (pump failures, heating and cooling system failures) causes reports to upper administration.	Worn-out systems require manpower to be scheduled to react to systems that are performing poorly or not at all. Significant time spent procuring parts and services due to the high number of emergencies with weekly reporting. PM work possible consists of simple tasks and is done inconsistently (filter changing, greasing and fan belt replacement, etc.).	No PM performed due to more pressing problems. Reactive maintenance is a necessity due to worn-out systems (doors won't lock, fans lock up, HVAC systems fail). Good emergency response because of skills gained in reacting to frequent system failures (no status reporting, upper administration is tired of reading the reports).

Level	1	2	3	4	5
Description	Superior	Adequate	Fair	Limited	Emergent Services Only
Interior	Like-new finishes.	Clean/crisp finishes.	Average finishes.	Dingy finishes.	Neglected finishes.
Lighting	Bright and clean, attractive lighting.	Bright and clean, attractive lighting.	Small percentage of lights out, generally well lit and clean.	Numerous lights out, some missing diffusers, secondary areas dark.	Dark, lots of shadows, bulbs and diffusers missing, cave-like, damaged, hardware is missing.
Service Efficiency	Maintenance activities appear highly organized and focused. Typically, equipment and building components are fully functional and in excellent operating condition. Service and maintenance calls are responded to immediately. Buildings and equipment are routinely and regularly upgraded, keeping them current with modern standards and usage.	Maintenance activities appear organized with direction. Equipment and building components are usually functional and in operating condition. Service and maintenance calls are responded to in a timely manner. Buildings and equipment are regularly upgraded, keeping them current with modern standards and usage.	Maintenance activities appear to be somewhat organized, but remain people dependent. Equipment and building components are mostly functional, but suffer occasional breakdowns. Service and maintenance call response times are variable and sporadic, without apparent cause. Buildings and equipment are periodically upgraded to current standards and use, but not enough to control the effects of normal usage and deterioration.	Maintenance activities appear somewhat chaotic and are people dependent. Equipment and building components are frequently broken and inoperative. Service and maintenance calls are typically not responded to in a timely manner. Normal usage and deterioration continues unabated, making buildings and equipment inadequate to meet present use needs.	Maintenance activities appear chaotic and without direction. Equipment and building components are routinely broken and inoperative. Service and maintenance calls are never responded to in a timely manner. Normal usage and deterioration continues unabated, making buildings and equipment inadequate to meet present use needs.
Building Systems Reliability	Breakdown maintenance is rare and limited to vandalism and abuse repairs.	Building components occasionally breakdown.	Building and systems components periodically or often fail.	Many systems unreliable. Constant need for repair. Backlog of repair needs exceeds resources.	Many systems unreliable. Constant need for repair. Backlog of repair needs exceeds resources.

APPENDIX F: INVENTORY STATUS SCENARIOS

The scenario chart below is provided to assist agencies in providing accurate status changes for an inventory record (property, location and lease). If you are unsure on the type of status to identify in a facility record, please contact OFM.

Owned Inventory Scenarios		
Scenario	Property Status	Location Status
An existing property currently included in the facilities inventory has been reviewed and resubmitted. These statuses apply even if edits have been made to the record.	Active	Active
A property that was not previously included in the inventory has been added.	New	New
A property that was previously included in the inventory has been deleted. <i>Note: Comments should include clarification on why the property is being deleted (demolition, disposal, etc.)</i>	Delete	Delete

Leased Inventory Scenarios			
Scenario	Property Status	Location Status	Lease Status
An existing property and lease currently included in the facilities inventory has been reviewed and resubmitted. These statuses apply even if edits have been made to the record.	Active	Active	Active
An existing property has had a new lease added to the inventory.	Active	New	New
A lease for an existing property has been renewed or the landlord/vendor or lease number has changed.	Active	Active	New
A lease for an existing property has been replaced because the lease has been renewed or Landlord/Vendor and/or the Lease Number information have changed.	Active	Active	Delete
A leased property and associated lease that were not previously included in the inventory have been added.	New	New	New
A property and/or lease that were previously included in the inventory have been deleted.	Delete	Delete	Delete

Washington State Office of Financial Management
Insurance Building * PO BOX 43113 * Olympia, WA 98504-3113
(360) 902-0555 * FAX (360) 664-2832