

# 2019–25 Six-Year Facilities Plan Agency Desired Plan Instructions

The Office of Financial Management works with state agencies to determine the long-term facilities needs of state government to ensure cost-effective facility planning. Each agency develops an Agency Desired Six-Year Facility Plan, or ADP, that includes agency space requirements and other data that promotes a common understanding of business space needs and efficient use of resources. That plan is used as the foundation for creating the final ADP.

Agencies will create the final 2019–25 Agency Six-Year Facilities Plan using a three-step process:

- 1) By May 31, 2018, agencies will complete a baseline report of in-scope facilities using the facilities portfolio management tool (FPMT) and submit it to OFM.
- 2) By Aug. 1, 2018, agencies will complete an ADP, modified predesign form (MPD) and project summaries, as appropriate, and submit as a package to OFM. (Instructions are below.)
- 3) By Oct. 1, 2018, agencies, in collaboration with OFM, will finalize the Six-Year Facilities Plan.

## Instructions – agency desired plan

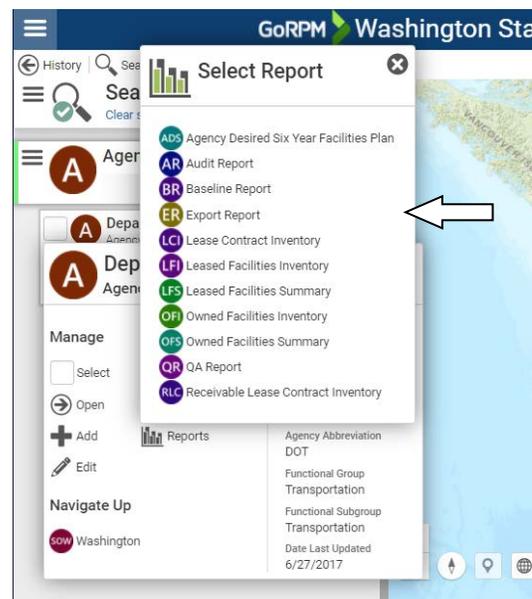
The ADP includes identifying, by facility, the facility action (need) to acquire new space, expand, relocate existing space or complete a major reconfiguration project and completing a MPD or project summary, as appropriate for each.

STEP 1. Agency will run the FPMT ADP report. This report is created in FPMT from the Agency tab, similar to the baseline report. Once the report is run and downloaded as an Excel file, the agency will complete the Planned Actions portion in Excel by identifying the desired action (need) for each facility.

STEP 2. Agency will complete MPD or project summary, as appropriate, for each desired action.

STEP 3. Agency leadership will review and approve the ADP.

STEP 4. Agencies will submit the leadership-approved ADP and the required MPDs and Project Summaries as a Six-Year Plan package to OFM.



## **Project summaries**

### **Basic project summary**

Projects that occur after July 1, 2021, require a basic project summary form.

The basic project summary form defines the agency's business need and projected scope. Download the [basic project summary form](#) from the OFM Six-Year Facilities Plan website. See the basic project summary field-by-field instructions below.

### **Modified pre-design**

Projects that will take place during the 2019–21 biennium require a completed MPD.

Download the [MPD form](#) from the OFM Six-Year Facilities Plan website to ensure you are using the latest version. Complete all sections of the MPD except for the workplace strategy and authorization sections. The MPD form does *not* require a space planning data sheet. Please note that actions dates are the first day of the month.

When the agency is ready to proceed with the project, it will review and update the MPD as needed, complete the workplace strategy and authorization section, and a space planning data sheet, before submitting the project to OFM for approval.

### **Basic project summary – field-by-field instructions**

Projects in the ADP that occur after July 1, 2021, require a basic project summary form. This form defines the agency's business need and projected scope. See the following basic project summary field-by-field instructions. Download the [Basic Project Summary form](#) from the OFM Six-Year Facilities Plan website.

#### ***Contact information***

**Agency name:** Enter the agency name.

**Agency number:** Enter the agency three-digit number.

**Contact person:** Enter the agency point of contact for this project.

#### ***Project information***

**Project title:** Enter the title using project action type first, followed by the agency common name and location. Example: Relocate project office to Fife.

**Current UFI number(s):** Enter the unique facility identification (UFI) number(s) involved in the project.

**Primary space type:** Select the primary space type from the dropdown menu. If the type of space is not listed, please contact your OFM Facilities analyst.

**Project type:** Select the project type from the dropdown menu. If the type of project is not listed, please contact your OFM Facilities analyst.

**Proposed action date:** This date is the first day the agency takes control of the proposed space (typically the start date on lease term). All dates must be the first day of the month.

**Proposed city/county:** Enter the city or county where the facility will be located at the project end. The location is essential for OFM to forecast market rate information.

**Estimated rentable square feet:** Enter the total estimated rentable square feet in whole numbers.

**Estimated workspace count:** Enter the total estimated workspaces in whole numbers. This includes offices, workstations, mobile benches and touchdown spaces.

**Estimated user count:** Enter the total estimated user count in whole numbers. A user is any person who routinely works at a facility for any amount of time and may have an assigned workspace. A user is not a customer or client being served.

**Estimated ongoing cost:** Enter the total estimated ongoing cost in whole numbers rounded to the nearest thousand.

**Estimated one-time cost:** Enter the total estimated one-time cost in whole numbers rounded to the nearest thousand. One-time costs are required for all projects over 20,000 square feet and optional for project under 20,000 square feet.

### ***Project business need***

**Describe the circumstances that create the need for this facilities project:** Provide a brief description of the business need for this project and how the preferred solution will affect agency operations. Describe how the location (city and county) was determined. Also include positive and negative impacts and any anticipated efficiencies gained.

It is recommended that agencies gather input from program, budget, human resources and IT staff in determining business needs and justification. Additional business needs may include legislative direction and intent or building condition.

### **Contact information**

For questions about the Six-Year Facilities Plan, instructions or to provide feedback, contact your agency's assigned OFM Facilities analyst:

Chuck McKinney  
Facilities Analyst

[Chuck.McKinney@ofm.wa.gov](mailto:Chuck.McKinney@ofm.wa.gov)  
360-584-5039

Kaye Foldvik  
Facilities Analyst

[Kaye.Foldvik@ofm.wa.gov](mailto:Kaye.Foldvik@ofm.wa.gov)  
360-810-0601

Scott Perkins  
Facilities Analyst

[Scott.Perkins@ofm.wa.gov](mailto:Scott.Perkins@ofm.wa.gov)  
360-584-2307