“We need to prioritize what is important rather than simply urgent in order to gain maximum effectiveness.”

- Stephen Covey
Introduction – Who is Jolie Lucas?

- CFM, AICP, LEED AP, Certified Charrette Facilitator
- Strategic Facilities Planner/Associate, RSP Architects
- IFMA San Diego member since 1996
Introduction – What is Strategic Facility Planning?

“... a two to five year plan encompassing the entire portfolio of owned and/or leased space that sets strategic facility goals based on the organization’s strategic objectives.”
What a Strategic Facility Plan is . . .

- ORGANIZATION’S MISSION
- BUSINESS OBJECTIVES
- FACILITIES ALIGNMENT
A Strategic Facility Plan is . . . a dynamic process.

1. Understanding
2. Analyzing
3. Planning
4. Acting

Figure 1. SFP Four-step Process
A Strategic Facility Plan is . . . flexible.
What a Strategic Facility Plan is . . . and is not.

<table>
<thead>
<tr>
<th>STRATEGIC FACILITY PLAN</th>
<th>MASTER PLAN</th>
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From IFMA Strategic Facility Planning White Paper
What a Strategic Facility Plan is . . . and is not.

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The SFP Approach

Phase I
Vision

Visioning
Executive Interviews
Gap Analysis

Phase II
Discovery & Analysis

Workplace
Space Needs
Real Estate
Facility Condition
Logistics

Phase III
Recommendations

SWOT
Scenario Planning

Roadmap
The SFP Approach

Phase I
Visioning
  - Executive Interviews
  - Gap Analysis

Phase II
Discovery & Analysis
  - Workplace
  - Space Needs
  - Real Estate
  - Facility Condition
  - Logistics

Phase III
Recommendations
  - SWOT
  - Scenario Planning
  - Roadmap
Phase I - Vision

Phase I Vision
- Visioning
- Executive Interviews
- Gap Analysis

Phase II Discovery & Analysis
- Workplace
- Space Needs
- Real Estate
- Facility Condition
- Logistics

Phase III Recommendations
- SWOT
- Scenario Planning
- Roadmap
Phase I City of Austin - Alignment

Imagine Austin Vision
- liveable
- natural and sustainable
- mobile and interconnected
- prosperous
- value and respects its people
- creative
- educated

Facility Drivers
- adjacencies
- alternative workplace strategies
- agile/flexible buildings
- community partnering
- customer ease of use
- employee recruitment and retention
- lease vs. own
- mixed-use development
- MWE/MBE opportunities
- predictive maintenance
- right place at right time
- space availability
- space costs
- student integration
- sustainable practices
- uptime

Logistics Drivers
- carbon footprint contribution
- commute time and cost
- customer response time
- emergency responder efficiencies
- fuel costs
- land value
- mobile service efficiencies
- recreation accessibility
- redevelopment impact
- satellite hub offices
- static service efficiencies
- walkability
Phase I City of Austin - Gap Analysis

Importance vs. Current Performance

• 47 questions derived from 7 Imagine Austin Vision Statements

Overall results demonstrate:

• Importance of citywide strategic planning
• Move from silos to networked organization
• Generational shifts imminent
Phase II – Discovery + Analysis

Phase II Discovery & Analysis:
- Workplace
- Space Needs
- Real Estate
- Facility Condition
- Logistics

Phase I Vision:
- Visioning
- Executive Interviews
- Gap Analysis

Phase III Recommendations:
- SWOT
- Scenario Planning
- Roadmap
Phase II – Discovery + Analysis: Workplace

- **Traditionals** (1930 - 1945)
- **Boomers** (1946 - 1964)
- **Xers** (1965 - 1979)
- **Gen Y / Millennials** (1996 - 2010)

## Business Model
- Traditionals: [Image]
- Boomers: [Image]
- Xers: [Image]
- Gen Y / Millennials: [Image]

## Organizational Structure
- Traditionals: [Image]
- Boomers: [Image]
- Xers: [Image]
- Gen Y / Millennials: [Image]

## Technology
- Traditionals: [Image]
- Boomers: [Image]
- Xers: [Image]
- Gen Y / Millennials: [Image]

## Workplace
- Traditionals: [Image]
- Boomers: [Image]
- Xers: [Image]
- Gen Y / Millennials: [Image]
Phase II City of Austin: Workplace + Space Needs

23% projected employee growth within 15 years
33% retirement eligible within 10 years
56% potential employee turn over

Looking ahead
- Recruitment & retention of employees will be critical
- Develop new workplace standards and policy
- Employee experience, engagement and wellbeing are key to:
  - Becoming a “best run city”
  - Managing costs
  - Competing in an employee market
Phase II – Workplace + Space Needs Strategy

Who’s where?
How much space do they have?
How much space do they need?
Is the space supporting their work?

PERCENTAGE OF TIME EMPLOYEES SPEND AT WORKPLACE LOCATIONS

- In my office or cubical: 62%
- In this building, but not at my desk or cubical: 16%
- At another city building: 8%
- Off-site at a customer’s office or in the field: 14%
Phase I City of Austin – Existing Conditions

- Ad-hoc facility decisions
- Overcrowded facilities
- Service crews & fleet services alignment not optimal
- Reactive facility maintenance & capital renewal
- No modern facility management software tools
Phase II City of Austin - Ops + Maintenance Strategy

Condition Assessment of Key Facilities

City-wide Condition Assessment

- Good
- Poor
- Bad
- Pending

Keep and fix to good condition
Sell “as-is” (poor and bad condition)
Sell “as-is” (good condition)

2012
2027
Phase II City of Austin - Real Estate Strategy

Austin’s Urbanized Area 1940-2010

Imagine Austin - CAMPO Centers Concept

City of Austin Imagine Austin Comprehensive Plan - Austin’s Urbanized Area: Accessed at ttp://www.ci.austin.tx.us/compplan/compnews.cfm?nwsid=3065

Phase II City of Austin - Logistics Strategy

<table>
<thead>
<tr>
<th>Department</th>
<th>Potential Savings $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austin Resource Recovery</td>
<td>1,106,885</td>
</tr>
<tr>
<td>Austin Water Utility</td>
<td>754,957</td>
</tr>
<tr>
<td>Public Works</td>
<td>318,590</td>
</tr>
<tr>
<td>Watershed Protection</td>
<td>170,652</td>
</tr>
<tr>
<td>Transportation</td>
<td>97,596</td>
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<tr>
<td>Code Compliance</td>
<td>75,771</td>
</tr>
<tr>
<td>Health &amp; Human Services</td>
<td>57,426</td>
</tr>
<tr>
<td>Parks &amp; Recreation</td>
<td>49,112</td>
</tr>
<tr>
<td>Building Services</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total Potential Savings</strong></td>
<td><strong>2,630,990</strong></td>
</tr>
</tbody>
</table>
Phase III - Recommendations
Phase III Scenario Planning... IFMA defined

- Best Case
- Worst Case
- All-right Case
Phase III Scenario Planning . . . depends on need

Short - Term
Mid - Term
Long - Term
Phase III Scenario Planning... depends on need.
Phase III City of Austin - Strawman Scenario

Based on 7 Scenario Planning Criteria...

- Created action plan for each of the facilities in the study

Key Objectives:

- Consolidate dispersed and inefficient facilities
- Replace or abandon obsolete facilities
- Align portfolio and service crews with long-term city planning, community priorities and sustainability goals
Phase III – City of Austin: Recommendations

Expense
- Leasing
- Remodeling

Build
- New Space

Income
- Offsets 45% of Expenses
- Eliminate Deferred Maintenance
  - Logistics Improvements
  - Lease Exits
  - Property Sales
## Phase III – Austin Energy: Recommendations

<table>
<thead>
<tr>
<th>Impact on Office Buildings</th>
<th>Scenario 1</th>
<th>Scenario 2</th>
<th>Scenario 3</th>
<th>Today NOT Tomorrow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town Lake Center (TLC)</td>
<td>33,164,836</td>
<td>(22,071,525)</td>
<td>(22,071,525)</td>
<td>25,435,914</td>
</tr>
<tr>
<td>811</td>
<td>59,358,450</td>
<td>0</td>
<td>0</td>
<td>29,929,695</td>
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<tr>
<td>Rutherford 311 Call Center</td>
<td>9,500,400</td>
<td>9,500,400</td>
<td>9,500,400</td>
<td>9,500,400</td>
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<tr>
<td>Rutherford Rev. Measurement</td>
<td>4,824,000</td>
<td>4,824,000</td>
<td>4,824,000</td>
<td>4,824,000</td>
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<tr>
<td>MOPAC</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>5,541,300</td>
</tr>
<tr>
<td><strong>Impact on Service Centers</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kramer</td>
<td>12,315,756</td>
<td>22,527,502</td>
<td>29,401,939</td>
<td>8,536,802</td>
</tr>
<tr>
<td>St. Elmo</td>
<td>6,915,927</td>
<td>13,392,007</td>
<td>23,844,200</td>
<td>4,762,391</td>
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<tr>
<td>Justin Lane</td>
<td>12,671,514</td>
<td>12,671,514</td>
<td>12,671,514</td>
<td>7,542,628</td>
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<td>Decker Steel Yard</td>
<td>897,006</td>
<td>897,006</td>
<td>544,500</td>
<td>814,679</td>
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<tr>
<td>SCC</td>
<td>71,582,319</td>
<td>71,457,319</td>
<td>(23,300,000)</td>
<td>13,593,169</td>
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<tr>
<td>ECC</td>
<td>(3,103,650)</td>
<td>(3,103,650)</td>
<td>(3,103,650)</td>
<td>3,105,247</td>
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<tr>
<td>BUCC</td>
<td>309,000</td>
<td>309,000</td>
<td>309,000</td>
<td>309,000</td>
</tr>
<tr>
<td>Rosewood Zaragoza</td>
<td>1,697,700</td>
<td>0</td>
<td>0</td>
<td>529,650</td>
</tr>
<tr>
<td><strong>New Buildings</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Service Center</td>
<td>3,125,000</td>
<td>7,260,800</td>
<td>7,260,800</td>
<td>NA</td>
</tr>
<tr>
<td>New Corporate HQ</td>
<td>0</td>
<td>108,001,600</td>
<td>166,011,695</td>
<td>NA</td>
</tr>
<tr>
<td>New Customer Service/Customer Care Center</td>
<td>0</td>
<td>2,070,800</td>
<td>3,063,600</td>
<td>NA</td>
</tr>
<tr>
<td><strong>Total Estimated Cost</strong></td>
<td><strong>213,258,257</strong></td>
<td><strong>227,736,772</strong></td>
<td><strong>208,956,473</strong></td>
<td><strong>114,424,874</strong></td>
</tr>
</tbody>
</table>
Phase III – Austin Energy: Recommendations
The Road Ahead

- Implementation of Strategic Facilities & Logistics Roadmap:
  - Develop financial & funding strategies
  - Identify near-term implementable projects to advance the Roadmap
- Tools & technology implementation & support
- Evaluate organizational alignments & efficiencies
- Build key organizational competencies
SFP Outcomes - HIGHLIGHTS

- Detailed Facility Condition Assessments
- Logistics Study
- Organization Assessment
- Integrated Workplace Management System
- Individual Action Plan for Facilities
- Roadmap
Questions?

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