



State of Oregon | Department of Administrative Services  
Statewide Facility Planning Process Manual

2027-29 Biennium

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# 2027-29 Statewide Facility Planning Process

## Overview

This manual provides requirements and expectations for submitting agency facility plans in accordance with [ORS 276.227](#), the Statewide Facility Planning Process (SFPP). The SFPP requires subject agencies to submit six-year agency facility plans for review by the Capital Projects Advisory Board (CPAB) in preparation of agency request budgets (ARB).

## Changes for 2027-29 Biennium

### Tririga FCA

In 2025, the Department of Administrative Services (DAS) implemented Tririga FCA for managing and reporting statewide facility information, in accordance with [ORS 276.227\(4\)](#). Tririga FCA replaces a previous system, iPlan, as an enterprise **system of record** for managing facility condition assessment (FCA) data, which is essential for developing agency facility plans in support of the agency request budget (ARB) for capital construction and improvement. All subject agencies are required to maintain facility condition data in the Tririga FCA environment. Select agencies have been given exception to this requirement by utilizing an integration protocol between Tririga and the agencies' existing database. These agencies are still required to validate their facility data within Tririga to ensure accuracy.

### CPAB Report

The advent of Tririga FCA is its robust reporting capability. In addition to user-created reports, subject agencies will maintain their agency's building, asset and opportunity records within Tririga FCA, and run a pre-programmed community report, called "CPAB report", that will serve as the agency facility inventory component of the agency facility plan (AFP). **Agencies must manage and validate all facility records in the Tririga environment before running the CPAB report.** The system will generate a static PDF of the report that must be submitted by the deadlines provided in the Group Submission and Presentation Schedule outlined further in this manual. (Refer to [Appendix H: CPAB Report](#) for reference on specific field calculations within the CPAB report.)

### Area Plan Update Requirements

In accordance with [ORS 276.056](#) and [OAR 125-125-0400](#), agencies with facilities located within geographies of one or more area plans are required to update these plans every six years. For additional information on area planning, refer to [Area Plan Development Requirements](#) further in this manual.

### Building Energy Performance Standards (BPS)

Established by House Bill 3409 in 2023, the [Oregon Building Energy Performance Standard \(BPS\)](#) is a mandatory program designed to reduce energy consumption and greenhouse gas emissions in existing large buildings. Managed by the Oregon Department of Energy (ODOE), the

standard requires owners to track energy use and meet specific performance targets based on building size and type, expressed as an energy use intensity (EUI). Agencies are required to report EUIs and corresponding targets (EUI<sub>t</sub>) for currently covered buildings (by tier) in their AFP.

#### Seismic Resilience: Executive Order 25-22

[Executive Order 25-22](#) directs agencies to strengthen the seismic resilience of state-owned buildings by requiring planning and design standards to reduce risk from a major Cascadia or other earthquake. Agencies are required to *“improve all facilities where employees work to achieve, at a minimum, current building standards for life safety, permitting employees to exit safely following an earthquake.”* Further, agencies must *“develop facility seismic safety plans in coordination with Capitol Projects Advisory Board (CPAB) with a 2060 timeline and prioritize requests to implement those plans in their agency budget requests.”* Agencies are required to report their plans and progress in achieving life safety standards as part of their AFPs.

# Introduction

State agencies own and maintain over 5,000 facilities, comprising 23 million gross square feet (GSF), with a value of roughly \$8.3 billion (2022). Agencies operate in every corner of the state, with the highest concentration in the Salem area. State facilities cover a vast range of uses, from major office buildings (such as the 250,000 GSF Portland State Office Building) to minor support facilities perched atop mountains and alongside highways.

Protecting the integrity of state facility assets requires proper management. Facility managers must continuously evaluate their facility needs and determine a course of action using available agency resources. In essence, agencies must develop plans for how to strategically maintain their facilities over time.

## Purpose

Statewide facility planning establishes an important nexus between agency-level facility operations and maintenance, long-range strategic planning, and the capital budgeting process. This nexus is codified in [ORS 276.227](#), enabling a Statewide Facility Planning Process (SFPP) which guides agency facility planning and investment decisions according to best practices in facility stewardship and seeks to ensure state facilities are measurably efficient, effective and affordable.

DAS is charged with administering the SFPP, requiring all facility-owning agencies to develop and report their agency facility plans each biennium. The SFPP “evaluates the needs of the state’s facilities, provides comparative information on the condition of the state’s facilities, establishes guidelines and standards for acquiring, managing and maintaining state facilities and provides financing and budgeting strategies to allocate resources to facilities’ needs.” ([ORS 276.227\(2\)](#))

## Facility Planning

Statewide facility planning is a multidimensional enterprise that employs industry best-practices and strategic planning principles to identify facility-related interventions to best serve the agency and the state. Facility plans stratify short and long-term objectives and specify actions that can range from routine maintenance to entire facility replacement; from minor interior remodels to major construction projects.

While AFPs serve a fundamental purpose in the SFPP, they are primarily oriented toward estimating financial liabilities related to facility operations and maintenance, particularly for the proceeding biennium. Facilities are costly to adequately maintain and can significantly impact an agency’s operations and maintenance budget. Each agency has their individual approach to operating and maintaining their facilities; the state does not have centralized facility management. While DAS has made strides in the past several biennia to unify an approach through FCAs, maintaining this “statewide view” has proven to be challenging. AFPs not only provide DAS and the Legislature reasonable insight into agency maintenance costs, but also report key performance indicators, such as effectiveness, efficiency, and affordability that speak to the quality and consistency of state asset protection and stewardship. This is crucial, as the

Legislature has prioritized reducing the state's backlog of deferred maintenance. That is, capital renewal not completed as scheduled that has escalated in cost, and potential liability, over time.

## SFPP Administration

Statewide facility planning is administered through the Enterprise Asset Management (EAM) division at DAS. In coordination with the Budget and Management (BAM) section of the Chief Financial Office (CFO), the SFPP provides critical review of agency facility plans and capital construction project requests in advance of the Statewide Budget Process. The SFPP is “a means of evaluating whether state facilities are planned, financed, acquired, constructed, managed, and maintained in a manner that maximizes and protects the investment” ([OAR 125-125-150](#)).

As part of this process, subject agencies prepare biennial AFPs that outline current biennial facility maintenance and space needs for inclusion in the ARB. The reported needs address deferred maintenance, capital renewal and major facility upgrades, such as natural hazard mitigation and facility modernization. In addition to current needs, agency plans must provide up to 10 years of future maintenance and space needs, to the extent such information is available for planning purposes.

Prior to submitting an ARB, subject agencies are required to present their AFPs to CPAB for public review and recommendation in accordance with [ORS 276.227\(3\)\(a\)](#) and [OAR 125-125-250](#).

# Process Overview

In accordance with [ORS 276.227](#) and [OAR 125-125-0150](#), CPAB, with the assistance of DAS staff, provides the DAS director with advisory information and recommendations in support of the Governor's Recommended Budget (GRB) development.

The state has a decentralized facility planning process. Each agency is responsible for planning and identifying needs to properly maintain their facilities. In accordance with [ORS 276.227\(3\)](#) and [OAR 125-125-0150](#), subject agencies must submit an AFP to DAS each biennium as part of the SFPP. The SFPP is intended as a common framework for evaluating agency capital funding requests to best protect state's capital assets; ensure rational, data-driven investment decisions; and provide facilities that help deliver responsive government services.

Agency facility plans must be presented to CPAB prior to submitting capital funding requests as part of the biennial statewide budget development process. In practice, DAS coordinates a CPAB presentation schedule for each agency, generally occurring during a monthly CPAB meeting from April to July in the even-numbered year preceding the biennial legislative session.

In addition, agencies with qualifying major construction/acquisition projects must present project proposals to the Capitol Planning Commission (CPC), in accordance with [OAR 125-125-0250\(5\)](#) to ensure projects comply with existing area plans.

## Authority

For Oregon Revised Statutes (ORS), refer to [ORS 276.227](#);

For Oregon Administrative Rules (OAR), refer to [OAR 125-125](#).

## Roles and Responsibilities

- **Subject agency:** Agencies, as defined by [OAR 125-125-0150\(2\)](#); prepares AFPs for review in accordance with procedures outlined in [OAR 125-125-0250](#).
- **DAS staff:** Administers the Statewide Facility Planning Process; provides technical assistance; coordinates and documents SFPP compliance.
- **Capital Projects Advisory Board (CPAB):** Reviews AFPs and qualifying capital projects in accordance with [OAR 125-125-0300](#)
- **Capitol Planning Commission (CPC):** Reviews agency project proposals for area plan compliance in accordance with [OAR 125-125-0350](#); reviews and adopts area plan updates in accordance with [OAR 125-125-0500](#).

# Definitions

## Acronyms

- **AFP** – Agency facility plan
- **ARB** – Agency request budget
- **BAM** – [Budget and Management, a section of the CFO](#)
- **BPS** – [Building Energy Performance Standards](#)
- **CFP** – [Capital Finance, a section of the CFO](#)
- **CFO** – [Chief Financial Office, a division of DAS](#)
- **CPAB** – [Capital Projects Advisory Board \("board"\)](#)
- **CPC** – [Capitol Planning Commission \("commission"\)](#)
- **DAS** – Department of Administrative Services
- **EAM** – [Enterprise Asset Management, a division of DAS](#)
- **EUI** – Energy Use Intensity
- **FCA** – Facility Condition Assessment
- **FCI** – Facility Condition Index
- **GRB** – Governor’s recommended budget
- **GSF** – Gross square feet or footage
- **LSF** – Leased square footage
- **OAR** – Oregon Administrative Rule
- **ODOE** – Oregon Department of Energy
- **ORS** – Oregon Revised Statute
- **PLAC** – [Public Lands Advisory Committee](#)
- **SFPP** – Statewide Facility Planning Process

## Terminology

- **Agency:** Any state officer, board, commission or department, or any division thereof, authorized by law to engage in capital construction or improvement projects in the area described by [ORS 276.054](#).
- **Agency facility plan:** A long-range maintenance and management plan for facilities described under [ORS 276.227\(3\)\(b\)](#).

- **Area Plan:** A plan setting policies and standards to guide development of a specific geographical area described by [ORS 276.054](#).
- **Biennial leasing plan:** A summary of all continuing leases or changes in leasing activity proposed for the coming biennium. This will summarize agency leasing activities or requests and provide a context for individual leasing plans.
- **Board:** The Capital Projects Advisory Board (CPAB) appointed under [ORS 276.227\(3\)\(a\)](#), which is advisory to the DAS director.
- **Building maintenance plan:** A plan to be completed by a state agency that owns a building valued at \$1,000,000 or greater.
- **Capitol area:** The geographical area described by [ORS 276.054](#).
- **Capitol Area Coordination Plan:** The overall development plan for the Capitol Area, as described in [ORS 276.056\(a\)](#).
- **Capital construction:** Expenditures related to construction or remodeling of physical facilities with a project cost of \$1,000,000 or more.
- **Capital renewal:** The repair and replacement of facility assets to ensure continued functionality. Capital renewal planning generally follows a replacement schedule based on an asset's remaining useful life.
- **Commission:** The Capitol Planning Commission (CPC) appointed under [ORS 276.055](#).
- **Construction project plan:** A plan to be completed for all major construction or acquisition projects a state agency is anticipating within the next three biennia which is either new construction or adds area to or renovates an existing facility.
- **Covered buildings:** Agency buildings subject to [Building Energy Performance Standards \(BPS\)](#) as administered by the Oregon Department of Energy.
- **Current replacement value (CRV):** The calculated cost to reconstruct a facility in kind given material costs and market conditions. A CRV is escalated each fiscal year to match inflation.
- **Deferred maintenance:** Capital renewal that has gone unaddressed (as scheduled). Deferred maintenance is the result of unfunded capital renewal.
- **Department:** The Department of Administrative Services.
- **Director:** The Director of the Department of Administrative Services.
- **Energy Use Intensity (EUI) –** A specific measurement used to track a building's annual energy consumption relative to its size.
- **Energy Use Intensity Target (EUI<sub>t</sub>) –** The maximum amount of energy a building is allowed to consume based on its specific activity type and climate.

- **Facility Condition Index (FCI):** An industry standard snapshot of facility health. Expressed as a percentage, FCI is the quotient derived from dividing a facility's maintenance needs (capital renewal + deferred maintenance) by its current replacement value (CRV). (Refer to [Appendix D: Facility Condition Index \(FCI\)](#))
- **FCI: as-planned:** The resulting FCI with an agency's biennial facility plan fully funded.
- **FCI: current (fiscal year)** – The FCI based on combined 2026-29 cost estimates.
- **FCI: 10-year (fiscal year)** – The FCI in 2036 if maintenance needs are unfunded.
- **Leasing project:** A proposed new lease, business case and cost benefit analysis completed by state agencies that lease or plan to lease a site with 10,000 or more square feet of conditioned space for a term of ten years or more.
- **Major construction or acquisition project:** Any capital construction project or acquisition with an anticipated cost of \$1,000,000 or greater (Refer to [107BF11](#)).
- **Major facilities:** State agency facilities valued at \$1,000,000 or greater or comprising 10,000 or more gross square feet. (Refer to [Appendix G: Building Tiers](#))
- **Major leases:** State agency (private) leases that are 10,000 or more square feet of conditioned space for a term of ten years or more.
- **Minor facilities:** State agency facilities valued less than \$1,000,000. (Refer to [Appendix G: Building Tiers](#))
- **Modernization:** Alterations or replacement of facilities solely to implement new or higher standards to accommodate new functions, significantly improve existing functionality as well as replacement of building components that typically last more than 50 years (such as the building structure or foundations).
- **Priority maintenance needs:** The combined deferred maintenance and capital renewal needs classified by urgency (Priorities 1-3). (Refer to [Appendix F: Prioritization](#))
- **Project:** Expenditures for capital construction or for capital improvement and adoption or approval of Area plans in the area described by [ORS 276.054](#).
- **Space needs plan:** A plan to be completed by state agencies that own or plan to build or buy a building with 10,000 or more square feet; lease or plan to lease a site with 10,000 or more square feet of conditioned space for a term of ten years or more; plan to seek any Legislative or Emergency Board approval for a major construction, acquisition or leasing project; or plan to seek planning funds for a project with an anticipated cost of \$1,000,000 or greater over the next three biennia. The space needs plan includes the biennial leasing plan (Refer to [107BF13](#))
- **State agency:** Any agency subject to this rule as outlined in [OAR 125-125-0150\(2\)](#).
- **State agency facilities:** State-owned, agency-maintained facilities as defined by [ORS 276.210 and ORS 276.280\(2\)](#).

- **State facility inventory:** A centralized facilities database established under [ORS 276.227\(4\)](#).
- **Statewide Facilities Planning Process Manual:** A facility budget planning and reporting manual described in [OAR 125-125-0150\(4\)](#).

# Presentation Groups

The board reviews AFPs and presentations during its scheduled monthly meetings between April and July of the even-numbered year. To accommodate all agency presentations within scheduled meeting times, agencies are assigned to groups of four based (refer to [Table I](#)) on the size and complexity of their portfolio, with smaller, less complex agencies presenting earlier in the schedule.

**Table I – Agency Presentation Groups**

Agency	Group
Department of Agriculture (ODA)	1
Department of Aviation (ODAv)	1
Department of State Lands (DSL)	1
Public Employees Retirement System (PERS)	1
Department of Human Services (ODHS)	1
Oregon Department of Education (ODE)	1
Oregon Department of Veterans Affairs (ODVA)	1
Oregon Employment Department (OED)	2
Oregon Liquor and Cannabis Commission (OLCC)	2
Oregon State Polices (OSP)	2
Department of Public Safety Standards and Training (DPSST)	2
Oregon Department of Forestry (ODF)	2
Oregon Department of Fish and Wildlife (ODFW)	2
Oregon Parks and Recreation Department (OPRD)	2
Oregon State Hospital (OSH)	3
Department of Administrative Services (DAS)	3
Oregon Department of Corrections (ODOC)	3
Oregon Department of Transportation (ODOT)	3
Oregon Military Department (OMD)	3
Oregon Youth Authority (OYA)	3

## Group Submission and Presentation Schedule

[Table II](#) provides key dates for submitting materials in advance of the assigned group presentations to CPC or CPAB. Agencies are solely responsible for the timely delivery of required materials to DAS by the dates outlined.

**Table II – Group Submission and Presentation Schedule by Key Date**

<b>Group 1 Tasks</b>	<b>Week</b>	<b>Month</b>	<b>Date</b>
Capitol-area project review materials to DAS EAM	17	April	23
Capitol-area project review materials and staff report to CPC	18	April	30
CPC meeting and presentation	19	May	7
<b>Agency plan materials due to DAS EAM</b>	<b>21</b>	<b>May</b>	<b>22</b>
SFPP agency compliance memo	22	May	29
Agency plan materials due to CPAB	23	June	5
<b>CPAB meeting and presentation</b>	<b>24</b>	<b>June</b>	<b>12</b>
SFPP plan acceptance memo to agencies	25	June	19
<b>Group 2 Tasks</b>	<b>Week</b>	<b>Month</b>	<b>Date</b>
Capitol-area project review materials to DAS EAM	22	May	28
Capitol-area project review materials and staff report to CPC	23	June	4
CPC meeting and presentation	24	June	11
Agency plan materials due to DAS EAM	25	June	19
SFPP agency compliance memo	26	June	26
Agency plan materials due to CPAB	27	July	3
CPAB meeting and presentation	28	July	10
SFPP plan acceptance memo to agencies	29	July	17
<b>Group 3 Tasks</b>	<b>Week</b>	<b>Month</b>	<b>Date</b>
Capitol-area project review materials to DAS EAM	26	June	25
Capitol-area project review materials and staff report to CPC	27	July	2
CPC meeting and presentation	28	July	9
Agency plan materials due to DAS EAM	30	July	24
SFPP agency compliance memo	31	July	31
Agency plan materials due to CPAB	32	July	7
CPAB meeting and presentation	33	August	14

# Agency Procedures

## Procedure for Submitting Agency Facility Plans for Review

In accordance with [OAR 125-125-0250](#), subject agencies must submit and present an AFP to the board during even-numbered years preceding the next legislative session. Agencies must submit their plans and other required materials in accordance with the Group Submission and Presentation Schedule provided in the previous section.

Upon submission, DAS staff will review each AFP for completeness and responsiveness to board-established plan and project review criteria. DAS staff may return a list of questions to the agency or recommend changes prior to officially accepting the AFP in compliance with the SFPP.

If an agency has project(s) that require review by CPC as outlined in [ORS 276.059](#), then a supplemental project review proposal shall be prepared and submitted with the other required materials as outlined area project review section of this document. In accordance with [OAR 125-125-0350](#), all area projects must be reviewed for area plan compliance by CPC prior to being including in the agency's AFP and ARB.

## Preparing Agency Facility Plans

In accordance with [ORS 276.227](#) and [OAR 125-125-0150](#), the following materials must be submitted by email to DAS staff by the end of business on the date provided in the [Group Submission and Presentation Schedule](#), or a minimum of two weeks prior to the agency's presentation date.

1. **Agency facility plan**, including the following completed elements:
  - Agency facility inventory (CPAB report), including current and 10-year priority maintenance needs and FCI for all major facilities. (Refer to [Appendix H: CPAB Report](#) for definitions and calculations.)
  - [Agency budget forms](#)
    - i. [107BF02a](#) (Facility Planning Narrative).
    - ii. [107BF16a](#) (Facility Summary Report).
    - iii. [107BF16b](#) (Facility Operations and Maintenance/Capital Improvements).
    - iv. [107BF11](#) (Major Construction/Acquisition Project).
    - v. [107BF13](#) (10-Year Space Needs Summary).
2. **Agency facility plan presentation** consisting of all pertinent content elements as described in the [CPAB Presentation Guidelines](#) provided in this document.
3. **Agency facility plan summary memo** (presented on agency letterhead) stating the following:

- What the agency has accomplished with respect to facility stewardship and planning during the 2025-27 biennium.
- What changes the agency has experienced over this period and their impact on current and future facilities.
- What the agency's 2027-29 facility plan will accomplish.
- A brief description and cost estimate for any major construction/acquisition project.

## Preparing The Agency Facility Plan Presentation

### CPAB Presentation Guidelines

The following are recommended board guidelines for agencies to follow in preparing a concise, informative, and effective agency facility plan presentation. As always, agency presentations *should...*

- Be as brief as possible—though, this will depend on the agency portfolio size and projects.
- Be submitted and presented in reduced PDF format to ensure compatibility and efficient file size.
- Include photos that visually support the content being presented.

### CPAB Presentation Content Requirements

Agency presentations *must* provide a portfolio summary addressing the following components. Definitions for each component are provided in [Appendix A: Portfolio Summary](#).

#### **Facility Inventory**

- Total facilities
- Total major facilities
- Total minor facilities
- Total current replacement value (CRV)
- Total gross square footage (GSF)
- Total leased facilities
- Total leased square footage (LSF)
- Total major leases

#### **Facility Condition**

- Current facility condition index (FCI)
- Current condition rating

- Current level 1 FCI
- 10-Year FCI
- 10-Year condition rating
- 10-Year level 1 FCI
- Three biennium FCI trend

### **Building Energy Performance Standards**

- Covered buildings by tier
- Portfolio energy use intensity (EUI)
- Target EUI or actual EUI for covered buildings
- Building compliance
- Energy management plans (if applicable)

### **Seismic Risk (Executive Order 25-22 Compliance)**

- Total facilities that currently meet life safety performance and percentage of total buildings.
- Prioritization plan: Buildings with planned retrofits or other mitigation efforts (for biennium through 2060 (if applicable); prioritized according to scoring criteria).
- Disposition plan: Buildings that cannot be retrofitted cost-effectively will be repurposed, replaced, or surplus as part of ongoing portfolio management.

### **Plan Impact**

Agency presentations should clearly and concisely address how the plan:

- Supports the agency's overall mission, purpose and strategic goals;
- Identifies significant factors influencing the agency's facility needs;
- Addresses the agency's long-term needs and capacity;
- Considers alternatives for meeting the agency's needs (particularly major modernization projects);
- Supports effective stewardship of the agency's facilities;
- Identifies and mitigates risks to the agency's facilities; and,
- Incorporates climate change adaptation strategies where applicable.

### **Plan Summarization**

The SFPP maintains a standard approach to evaluating AFPs based on how proposed projects address three dimensions of priority: Facility Stewardship (Priorities 1-3), Seismic and Risk Mitigation (Priority 4), and Modernization (Priority 5). (Refer to [Appendix F: Prioritization](#) for project type and priority definitions.)

## Agency Plan and Priority Summary

Agencies must present a cost summary that clearly addresses Deferred Maintenance (Priority 1), Capital Renewal (Priorities 2-3), Seismic/Risk (Priority 4), and Modernization (Priority 5). Modernization (Priority 5) should be shown as a net cost (less Priorities 1-4) to accurately account for priority-related costs since total modernization project costs may include Priority 1-4 project work in their scope. This allows agencies to demonstrate how modernization projects can effectively address these other priorities. The following [Example I](#) table provides a hypothetical summary of plan costs by priority that should be used in agency plan presentations.

### Example I – Agency Plan and Priority Summary

Plan Cost Summary by Type/Priority	Total
Deferred Maintenance and Life Safety – Priority 1	\$45 million
Capital Renewal – Priority 2	\$5 million
Capital Renewal – Priority 3	\$40 million
Seismic and Risk – Priority 4	\$5 million
Modernization (Net) – Priority 5 <sup>1</sup>	\$5 million
Total	\$100 million

## Major Construction and Acquisition Projects

Major construction and acquisition project costs should be allocated by the funding amount directed toward each of the following plan dimensions: Facility Stewardship (Priorities 1-3), Seismic and Risk Mitigation (Priority 4), and Modernization (Priority 5<sup>1</sup>). A project may address multiple dimensions. For instance, a facility renovation project may eliminate a portion of deferred maintenance and allow for seismic rehabilitation in one execution. Priority 5 costs should be presented as a net amount after deducting Priority 1-4 costs. Distributing project costs in this manner provides added transparency and illuminates a project's effectiveness at addressing multiple funding priorities. [Example II](#) table illustrates a hypothetical project summary that should be included in agency plan presentations for all major construction and acquisition projects<sup>2</sup>.

<sup>1</sup> Priority 5, less project-related Priority 1-4 costs

<sup>2</sup> Projects \$1 million and greater in total cost (refer to 2027-29 [Budget Instructions](#) for additional information)

## Example II – Major Construction and Acquisition Project Summary

Project Name	Priority 1-3	Priority 4	Net Priority 5 <sup>1</sup>	Total	Phase <sup>3</sup>
Office Remodel	\$20 million	\$10 million	\$10 million	\$50 million	I
New Building	\$50 million	\$0	\$100 million	\$150 million	II

### CPAB Review

Following an initial review by DAS staff, agencies must present their AFPs to the board to ensure compliance with the criteria established in this document. Agency presentation dates are provided in the [Group Submission and Presentation Schedule](#). During an agency presentation, the board may pose further questions to the agency or determine if additional action is required and postpone acceptance or comment on the plans. The board may elect to review major construction or acquisition, or leasing projects, as necessary, or as requested by DAS or the DAS director. Generally, reviews of these projects will occur during a separate board meeting. To gain board acceptance, projects subject to board review must clearly address Capital Project Review criteria stated in this document.

In accordance with [OAR 15-125-0300\(4\)](#), a subject agency may not seek Legislative or Emergency Board approval of projects as defined by [OAR 125-125-0150](#) without first having the project reviewed by the board.

### Capital Project Review

In accordance with [OAR 125-125-0150](#), agencies submitting plans with major construction or acquisition projects, the board may request a review of the project proposal to ensure compliance with Capital Project Review criteria outlined in this document. DAS staff will inform the agency in writing of the need to present the proposed project to the board to gain full plan acceptance prior to submitting the proposal

### Capital Project Review Submission Requirements

For agency capital projects subject to board review, agencies must submit the following to DAS staff by the dates provided in the Group Submission or Presentation Schedule in this document or as assigned by DAS staff:

1. Email [DAS staff](#) informing them of a capital project needing review.
2. [Capital Project Review Intake Form](#), including any supporting materials, plans, and documents. For area projects subject to CPC review under [OAR 125-125-0350](#), an agency must include a statement of compliance from the commission or DAS staff upon their review.
3. A brief presentation describing the purpose and need for the proposed project and relevant context to support the board's review of the proposal, such as reference maps, images and sufficient demonstration of compliance with local land use ordinances.

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<sup>3</sup> Current project phase (*Phase I – Planning/Design or Phase II – Construction*)

## Capital Project Review Criteria

In addition to the required information stated above, the board may consider agency responses to the following as influential factors in determining support for a project proposal:

- Is the project supported by the agency's strategic facility and master plan?
- Does the project adequately address the stated purpose or need?
- Has the agency evaluated other alternatives?
- Is the agency's preferred alternative reasonable?
- What is the current project phase?
- Has the agency identified or secured an appropriate project site?
- Is the estimated total project cost reasonable?
- Does the project mitigate a risk(s) to the agency's facilities?
- Does the project implement climate change adaptation strategies?
- Does the agency have sufficient capacity to execute the project?

A proposing agency should address the above, to the extent they are relevant, when preparing their board presentations.

## Capitol Area Project Review

In accordance with [ORS 276.059](#) and [OAR 125-125-0350](#), the CPC administers a special review process for all capital construction projects occurring on state-owned property located within the boundaries described by [ORS 276.054](#). This review process applies to any state officer, board, commission or department authorized by law to engage in capital construction or improvement projects in the areas described by [ORS 276.054](#).

CPC reviews will be based upon, but not limited to, the development standards and policies contained in the area plans adopted by the commission. Area plans cover the following state properties: [Capitol Mall](#), [Airport Road](#), [Southeast Salem](#), [State Fair and Exposition Center](#), [Oregon State Hospital and Penitentiary Properties](#) and [Oregon School for the Deaf](#).

For subject agencies required to develop and maintain state area plans, as specified in [OAR 125-125-0400](#) and [ORS 276.054](#), please refer to Area Plan Development Requirements further in this manual.

## Qualifying Projects

For purposes of this review, a project means expenditures for capital construction valued at \$1,000,000 or greater. A project does not include the following:

- Interior remodeling that does not substantially change the existing use of space to another use (e.g., office space or space used by the public)

- Repair or maintenance that does not substantially change the existing use of space, that does not add additional square footage to a building and that does not change exterior building design
- Individual plantings within an established landscape plan that do not alter the overall plan concept

### Minor and Major Improvements

[OAR 125-125-0350](#) outlines separate submission requirements for both minor and major improvements.

- A minor improvement to the building or grounds means an improvement that does not fall within the exceptions stated above and impacts the appearance of the building grounds or exterior (refer to [OAR 125-125-0350\(10\)](#)).
- A major improvement to the building or grounds, addition, or new construction means a substantial renovation of the building exterior or landscaping, an addition to the building or construction of a new building (refer to [OAR 125-125-0350\(11\)](#)).

### Procedure for Capitol Area Project Review

In accordance with [ORS 276.059\(1\)](#), subject agencies may not request, receive or expend funds for any project subject to Capitol area review unless the project has been reviewed and approved by CPC. An agency is not precluded by this rule from expending funds for the preparation of a project proposal. DAS may waive this review requirement for good cause.

An agency seeking a Capitol area project review must provide written notification (via email) to the DAS staff not less than 21 days before the next scheduled commission meeting.

### Submission Requirements for Capitol Area Project Review

Qualifying projects for major or minor improvements to the building or grounds shall include:

1. [Capital Project Review Intake Form](#), including any supporting materials, plans and documents.
2. A brief presentation describing the purpose and need for the proposed project, including all supporting information as stipulated in [OAR 125-125-0350](#) according to project size (minor or major).

DAS staff will review the material submitted by the subject agency and acknowledge if the applicable requirements are met. DAS staff will prepare a report of findings to the commission one week prior to the scheduled meeting.

## Final Plan Acceptance

The board shall accept an AFP after consideration of the subject agency's submission, presentation, and supporting testimony. The board may provisionally accept an AFP pending additional requested information from the proposing agency. Upon satisfactory compliance with all requirements outlined in this document, DAS staff will provide a memorandum of plan acceptance from the board chair for agency records.

Board comments and recommendations shall be kept in the formal meeting minutes and provided to the DAS director and CFO at their request.

# Area Planning Development Requirements

## Background

“A special relationship exists between the City of Salem, Oregon’s capitol, and state government. State lands and buildings and the functions of state government have a significant impact on the City of Salem. It is declared to be the purpose and policy of the State of Oregon to establish and effectuate a long-range plan of development of the Area in the City of Salem and the areas immediately surrounding state buildings situated outside the Area within the boundaries of the City of Salem and to coordinate the acquisition and disposition of real property and the construction of buildings by the state, the laying out of streets and the landscaping of grounds in the areas. The purpose of the long-range plan is to enhance and preserve the beauty and dignity of the areas and permanently to secure the areas from commercial and industrial encroachment.” ([ORS 276.054](#))

## Area Plans

An area plan is a functional document that guides future development of state-owned properties in the Capitol area described in [ORS 276.054](#) (refer to the previous paragraph). Area plans are components of the Capitol area coordination plan, which addresses the interrelation of each area plan within the Capitol area as a whole and is maintained by DAS and the commission.

In contrast to more-specific development or master plans, area plans provide a policy framework that aligns land use goals with the City of Salem’s comprehensive and transportation system plans, among other dimensions, to ensure agency needs are compatible with site-specific opportunities and constraints. Area plans also articulate development standards that control the form of state facilities at the overall site level to maintain consistency with statewide policies and expectations concerning growth and development, design compatibility and community relationship.

An area plan consists of foundational analysis, combined with strategic agency goals and objectives, to formulate implementation policies and development standards to achieve desired outcomes. Each area plan reflects the unique site characteristics, specific uses and programmatic needs of the owning agencies, and provides clarity and consistency to the community.

Each state-owned property in the City of Salem belongs to an area plan. [Table III](#) provides each currently adopted area plan, its date of adoption, compliance status, and proposed update priority, as determined by DAS and the commission.

**Table III – Current Area Plans by Date of Adoption, Status and Update Priority**

Area Plan	Adopted	Update Status	Priority
<a href="#">Airport Road</a>	2010	Past Due	5
<a href="#">Capitol Mall</a>	1992	Past Due	1
<a href="#">Oregon School for the Deaf</a>	2013	Past Due	3
<a href="#">Oregon State Hospital and Penitentiary Properties</a>	2008	Past Due	2
<a href="#">Southeast Salem</a>	2008	Past Due	4
<a href="#">State Fair and Exposition Center</a>	2003	Past Due	6

### Plan Responsibility

Each property-owning agency in the area described in [ORS 276.054](#) shall be responsible for maintaining an area plan for the property it owns ([OAR 125-125-0400](#)). For area plans comprised of facilities and activities of more than one agency (e.g. [Oregon State Hospital and Penitentiary Properties](#)), the development, maintenance and implementation of the Area Plan plans must be a collaborative agreement for the agencies involved.

Major area plan updates shall be completed no later than six years from the date of adoption by the commission, unless determined by the commission or DAS. Minor area plan updates or corrections shall be reviewed and approved as needed but may not substitute for a major plan update.

In accordance with [OAR 125-125-0400\(4\)](#), DAS shall develop and maintain an area plan review schedule and update procedures. If outside assistance is required to update the plan, it shall be at the expense of the property-owning agency or agencies. DAS may waive this requirement for good cause.

### Area Plan Review Schedule and Update Procedures

#### Review Schedule

[Table IV](#) provides the update schedule as determined by DAS and the commission. The schedule calls for two area plan updates per biennium, beginning in 2025-27.

**Table IV – Area Plan Update Schedule**

Area Plan	Scheduled Update (Biennium)
<a href="#">Airport Road</a>	2030
<a href="#">Capitol Mall</a>	2026
<a href="#">Oregon School for the Deaf</a>	2028
<a href="#">Oregon State Hospital and Penitentiary Properties</a>	2027
<a href="#">Southeast Salem</a>	2029
<a href="#">State Fair and Exposition Center</a>	2031

Agencies must coordinate all funding and activities to complete the required area plan updates within the calendar years of scheduled biennium.

## Scoping and Development Process

### **Step 1: Contact DAS for assistance and project coordination**

Property-owning agencies subject to area plan updates shall contact the department to initiate the update process. DAS staff and the subject agency will review the current area plan and discuss the scope of work, engagement strategy, timing, and additional expectations for conducting the update.

### **Step 2: Conduct planning**

Agencies are solely responsible for managing plan updates. It is anticipated that agencies will engage with professional services to conduct the area plan update as necessary. DAS maintains a price agreement with several qualified architectural and engineering firms capable of conducting the expected area plan update work tasks. Agencies may elect to conduct plan updates themselves or use a consultant of their choosing (not on the DAS price list) but are solely responsible for procuring and completing the update within the expected timeframe.

Additionally, agencies must develop and submit an engagement plan for expected interactions with affected neighborhood groups, government entities, tribal organizations or other interested members of the public. DAS staff can provide guidance on preparing an engagement plan.

### **Step 3: Submit draft plan for department review**

Submit the draft area plan to DAS staff for review of completeness and compliance with the standard area plan elements. Following this step, agencies may need to revise plan elements to meet expectations.

### **Step 4: Submit final plan for commission review and adoption**

Submit final area plan for commission review, in accordance with [OAR 125-125-0500](#):

- Public hearing notice will be provided at least 14 days preceding the hearing. Additional notice may be provided to known stakeholders and anyone who requests it in writing by whatever method DAS deems necessary or desirable.
- A recommendation for approval requires the affirmative vote of not less than a majority of the total membership of the commission.
- The commission may recommend approval, conditional approval, or substantial revision. This recommendation will be forwarded to the DAS director, along with statements from DAS and the property-owning agencies indicating agreement or disagreement with the area plan and with the commission's recommendation.
- Once a hearing has been completed, the DAS director will approve, conditionally approve, or deny the area plan. Any conditions of approval should be made an integral part of the area plan prior to its adoption. If the plan is to be approved with a substantial

modification not previously considered by the commission the plan must be referred to the commission for their reconsideration and recommendation.

Additionally, if area plan updates involve the disposition of surplus state land, the subject agency must seek review by the Public Lands Advisory Committee (PLAC) before the plan can be fully adopted.

**Step 5: Adoption**

Adoption of an area plan is accomplished by administrative rule, following the accepted permanent rulemaking process. Rulemaking hearings regarding area plan adoptions will be held by the commission. Adoptions are listed under Oregon Administrative Rules, Chapter 125.

**Step 6: Amendment and Repeal of Existing Area Plan**

An area plan is repealed in the same manner it is amended, by administrative rule. Similar to adoption, the commission must hold at least one public hearing prior to taking any action.

**Standard Area Plan Template**

**Plan Elements**

In accordance with OAR 125-125-0400(3), DAS maintains a standard area plan template for agencies to use in developing their plan(s). [Table V](#) provides required elements for area plan updates, as determined by the commission. DAS staff can provide support for defining and satisfying these required plan elements. Agencies have latitude in formulating a plan that best reflects their needs. Updated area plans may deviate from the standard template for good cause, provided the purpose and intent of the standard plan elements are achieved.

**Table V – Standard Area Plan Template Elements**

Standard Area Plan Template (2026)	
1.	Introduction
1.1.	Purpose
1.1.1.	Statutory References
1.1.2.	Acknowledgements
1.2.	Strategic Framework
1.2.1.	Agency Strategic Plan
1.2.2.	Programs and Services
1.2.3.	Demand/Trend Analysis
1.2.4.	Area Plan Vision and Six-Year Goals
1.3.	Site and Planning History
2.	Site Analysis
2.1.	Location

2.1.1. Vicinity Map
2.2. Existing Conditions
2.2.1. Site Characteristics
2.2.2. Land Use
2.2.3. Facility Inventory
2.2.4. Facility Condition/Suitability
2.2.5. Opportunities and Constraints
2.3. Surrounding Community Development
2.4. Infrastructure
2.5. Transportation and Circulation
2.6. Comprehensive Plan Designation/Zoning
2.7. Special Overlay Zones (if applicable)
2.8. Natural Resources
2.9. Hazards/Risk
2.9.1. Flood
2.9.2. Seismic Assessment
3. Community Engagement
3.1. Stakeholders
3.2. Process
3.3. Findings
4. Six-Year Goals
4.1. Implementation Actions
4.2. Timeline
5. Development and Management Policies
5.1. Design Standards
5.2. Landscaping
5.3. Land Use
5.3.1. Scenarios/Alternatives
5.3.2. Plan Map

# Appendix

## A: Portfolio Summary

<b>Inventory</b>	<b>Definition</b>
Total Facilities	Count: All Facilities
Total Major Facilities	Refer to H: Building Tiers 1 and 2
Total Minor Facilities	Refer to H: Building Tiers 1 and 2
Total Current Replacement Value (CRV)	Calculated: All Facilities
Total Gross Square Footage (GSF)	Sum: Portfolio GSF
Total Leased Facilities	Count: Portfolio Leases
Total Leased Square Footage (LSF)	Sum: Portfolio LSF
Total Major Leases	Count: Leases 10K LSF or Greater
<b>Condition</b>	<b>Definition</b>
Current Facility Condition Index (FCI)	Refer to C: Metrics – Facility Condition Index (FCI)
Current Condition Rating	Refer to D: Facility Condition Index (FCI) – Condition Rating
Current Level 1 FCI	Refer to C: Metrics – Facility Condition Index (FCI)
10-Year FCI	Refer to C: Metrics – Facility Condition Index (FCI)
10-Year Condition Rating	Refer to D: Facility Condition Index (FCI) – Condition Rating
10-Year Level 1 FCI	Refer to C: Metrics – Facility Condition Index (FCI)
Three Biennium FCI Trend	Refer to C: Metrics – Facility Condition Index (FCI)
<b>Building Energy Performance Standards</b>	<b>Definition</b>
Portfolio Energy Use Intensity (EUI)	Refer to C: Metrics – Energy Use Intensity (EUI)
Target EUI/Actual EUI for Covered Buildings	Refer to C: Metrics – Energy Use Intensity (EUI)
<b>Seismic Resilience</b>	<b>Definition</b>
Total Life Safety Facilities	Count: Life Safety Building Performance (ASCE 41)
Total Operational Facilities	Count: Operational Building Performance (ASCE 41)

## B: Budget

### Costs

Total Opportunity Costs	Definition
Current Costs: Level 1	Priority 1 Opportunities; Current Year + Two Years
Current Costs: Level 2	Priority 1-3 Opportunities; Current Year + Two Years
10-Year Costs: Level 1	Priority 1 Opportunities; All Years
10-Year Costs: Level 2	Priority 1-3 Opportunities; All Years

### Funding

2027-2029 Funding Request	Definition
2027-29 Funding Request (As-Planned)	Total Funding Requests for 2027-29
2027-29 As-Planned FCI	(Total Opportunity Costs-Requested Funding)/CRV

### Major Construction/Acquisition\*

Project Attributes	Definition
Summary	Short Narrative
Type	Major Construction; Acquisition
Scope	New Construction; Remodel
Total Cost	Total Hard and Soft Costs
Total GSF	Total Constructed GSF
Total Cost per GSF	Total Hard and Soft Costs/Project GSF
Priority 1 Opportunities Addressed	Total Priority 1 Opportunities

### Leases\*

Lease Attributes	Definition
Summary	Short Narrative
Total LSF	Leased SF
Total Lease Cost per SF	Lease Cost (Monthly)/LSF

\*Major Construction/Acquisition Projects \$1M or Greater; Lease Projects 10K LSF or Greater/10 Years or Longer

## C: Metrics

### Facility Condition Index (FCI)

Metric	Definition
Level 1 FCI – Current and 10-Year	Refer to D: FCI Levels
Level 2 FCI – Current and 10-Year	Refer to D: FCI Levels
Portfolio FCI Trend – Three Biennia	Total Opportunity Cost (TOC)/CRV
Condition Rating	Refer to B: Condition Rating Scale

### Energy Use Intensity (EUI)

Metric	Definition
Portfolio Energy Use Intensity (EUI)	Combined EUI for all buildings
Target EUI/Actual EUI for Covered Buildings	Refer to <a href="#">Building Energy Performance Standards</a>

## D: Facility Condition Index (FCI)

### Current/10-Year FCI

FCI Formula	Definition
Current: Current Costs/CRV	Refer to B: Costs
10-Year: 10-Year Costs/CRV	Refer to B: Costs

### FCI Levels (CPAB)

Level	Building Tier	Calculated Priorities
Level 1 FCI	Tier 1 Buildings	Priority 1
Level 2 FCI	Tier 1 + Tier 2 Buildings	Priority 1 - 3

### Condition Rating

Rating	FCI (%)
Good	$\leq 5$
Fair	(5, 10)
Poor	(10, 60)
Very Poor	$\geq 60$

### Opportunity Status

Status	Definition
Planned	Active/Scheduled Opportunities; Included in FCI
Deferred	Past-Due Opportunities; Included in FCI
Committed	In-Progress Opportunities; Excluded in FCI
Completed	Completed Opportunities; Excluded in FCI; Archived

# E: Facility Condition Assessment (FCA)

## FCA Levels

Level	Building Tier	Assessment Scope
Level 1 FCA	Tier 1 Buildings	Tier 1 Buildings Complex Building System Items Energy/GHG Assessment/Audit Risk/Hazard Assessment Specialized Investigation
Level 2 FCA	Tier 2 Buildings	Tier 2 Buildings Simple Building System Items Select Building System Items

## F: Prioritization

### Opportunities by Plan Type (CPAB)

Opportunity Plan Type	Years 1-2	Years 2-4	Years 4-10
Deferred Maintenance	Priority 1	NA	NA
Capital Renewal	Priority 1/2	Priority 2/3	Priority 3
Capital Improvement	Priority 2	Priority 3	Priority 3

### Opportunities by Priority

Priority Level	Opportunity Plan Type	Plan Subtype	Alt Plan Subtype
Priority 1	Deferred Maintenance Capital Renewal	Life Safety Code Compliance	Life Safety and Security Enforceable Code Violation
Priority 2	Capital Renewal Capital Improvement	Energy ADA Functionality Seismic	HB3409 Major Maintenance End Of Useful Life
Priority 3	Capital Improvement	Routine Maintenance Replace on Failure	Additional Evaluation Needed Other

## G: Buildings Tiers

Tier 1 Buildings	Definition
Major Facilities	Buildings >\$1M CRV Buildings >10K GSF
Covered Buildings	Buildings subject to ODOE Building Performance Standards (BPS)
Mission-Critical Facilities	Buildings identified in COOP; agency-designated)
Culturally Significant Facilities	SHPO designation
Tier 2 Buildings	Definition
Minor Facilities	Buildings <\$1M CRV Buildings <10K GSF

## H: CPAB Report

### CPAB Report Calculations

CPAB Report Field	Sample Data	Tririga Source	Expression
Property	Region 1	triBuilding	triParentPropertyTX
Building	Portland State Office Building	triBuilding	triNameTX
CRV	\$101,630,573	triBuilding	triReplacementCostNU
GSF	252,105	triBuilding	triGrossAreaNU
Age (Years)	33	triBuilding	Current Year - triConstructedYearTX
Current: FCI	1.7%	triDeferredLineItem; triBuilding	CompActionYear = triTermYearsNU from the Opportunity Form. Filter will only show those records that have CompActionYear between the Start Year you choose at report run, and up to 2 years later. It will also include all items where cstOpportunityStatusLI = Deferred (In the opportunity Form) Sum of triTotalEstimatedRepairCostNU for this building / triReplacementCostNU
Current: Condition	GOOD	triDeferredLineItem	Calculate sum of triTotalEstimatedRepairCostNU for this building / triReplacementCostNU <.05 GOOD <.1 FAIR <.6 POOR >=.6 VERY POOR Filter will only show those records that have CompActionYear between the Start Year you choose at report run, and up to 2 years later.

Current: Priority 1 Costs	\$306,122	triDeferredLineItem	Sum of triTotalEstimatedRepairCost NU for this building Filtered on CompActionYear is what you chose for start year at report run and up to 2 years later. Also, triDeficiencyPriority (From Opportunity Form) = "1 - Critical failure is imminent and code violations"
Current: Total Costs	\$1,722,490	triDeferredLineItem	Sum of triTotalEstimatedRepairCost NU for this building Filtered on CompActionYear is what you chose for start year at report run and up to 2 years later.
10-Year: FCI	16.5%	triDeferredLineItem; triBuilding	CompActionYear = triTermYearsNU from the Opportunity Form. Filter will only show those records that have CompActionYear between the Start Year you choose at report run, and up to 10 years later. It will also include all items where cstOpportunityStatusLI = Deferred (In the opportunity Form) Sum of triTotalEstimatedRepairCost NU for this building / triReplacementCostNU
10-Year: Condition	POOR	triDeferredLineItem	Calculate sum of triTotalEstimatedRepairCost NU for this building / triReplacementCostNU <.05 GOOD <.1 FAIR <.6 POOR >=.6 VERY POOR Filter will only show those records that have CompActionYear between the Start Year you choose at report run, and up to 10 years later.
10-Year: Priority 1 Costs	\$3,432,091	triDeferredLineItem	Sum of triTotalEstimatedRepairCost NU for this building Filtered on CompActionYear is what you chose for start year at

			report run and up to 10 years later. Also, triDeficiencyPriority (From Opportunity Form) = "1 - Critical failure is imminent and code violations"
10-Year: Total Costs	\$16,761,707	triDeferredLineItem	Sum of triTotalEstimatedRepairCost NU for this building Filtered on CompActionYear is what you chose for start year at report run and up to 10 years later.