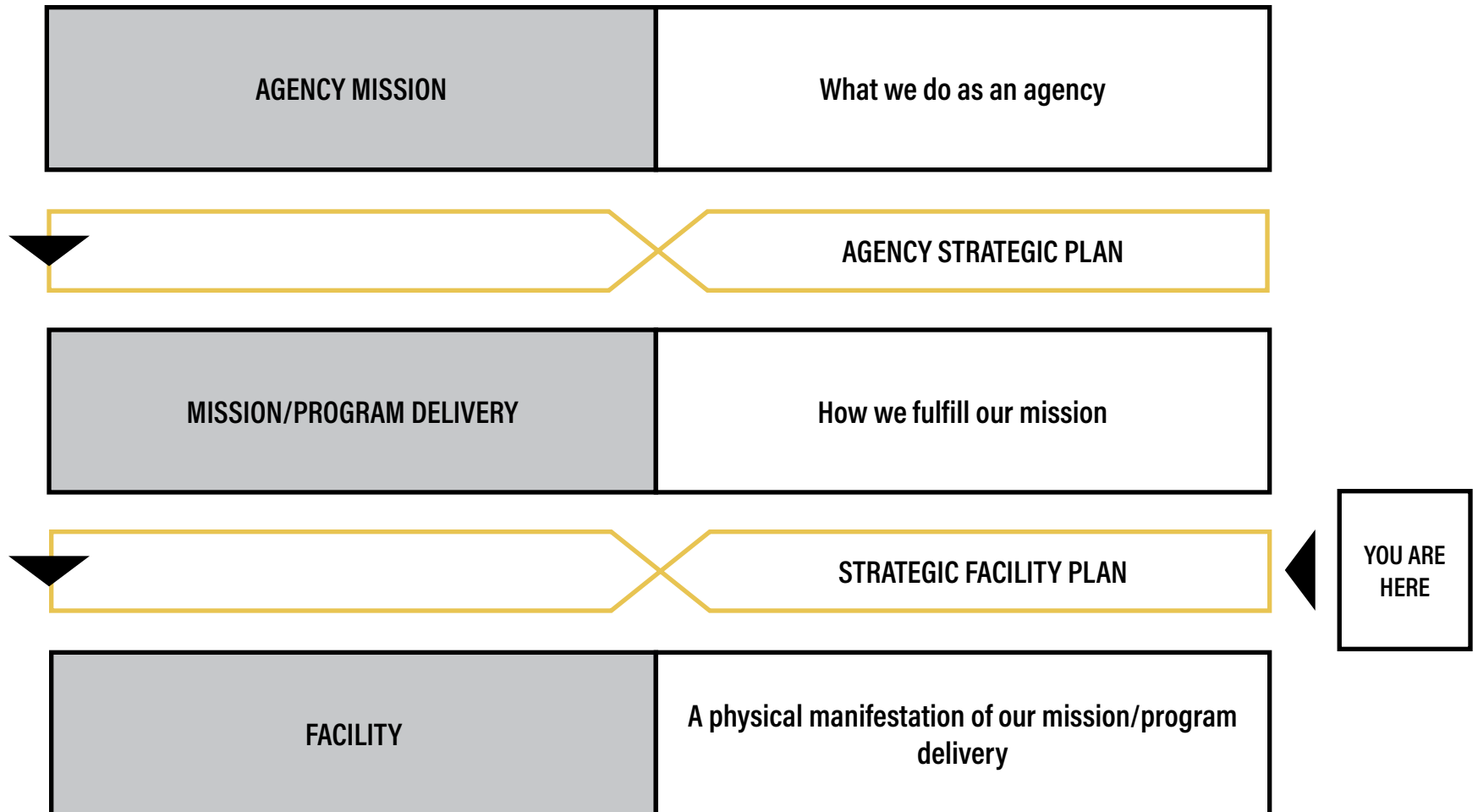


STRATEGIC FACILITIES PLANNING PROCESS/**GUIDE**

DEPARTMENT OF ADMINISTRATIVE SERVICES/CHIEF FINANCIAL OFFICE/FACILITIES PLANNING UNIT



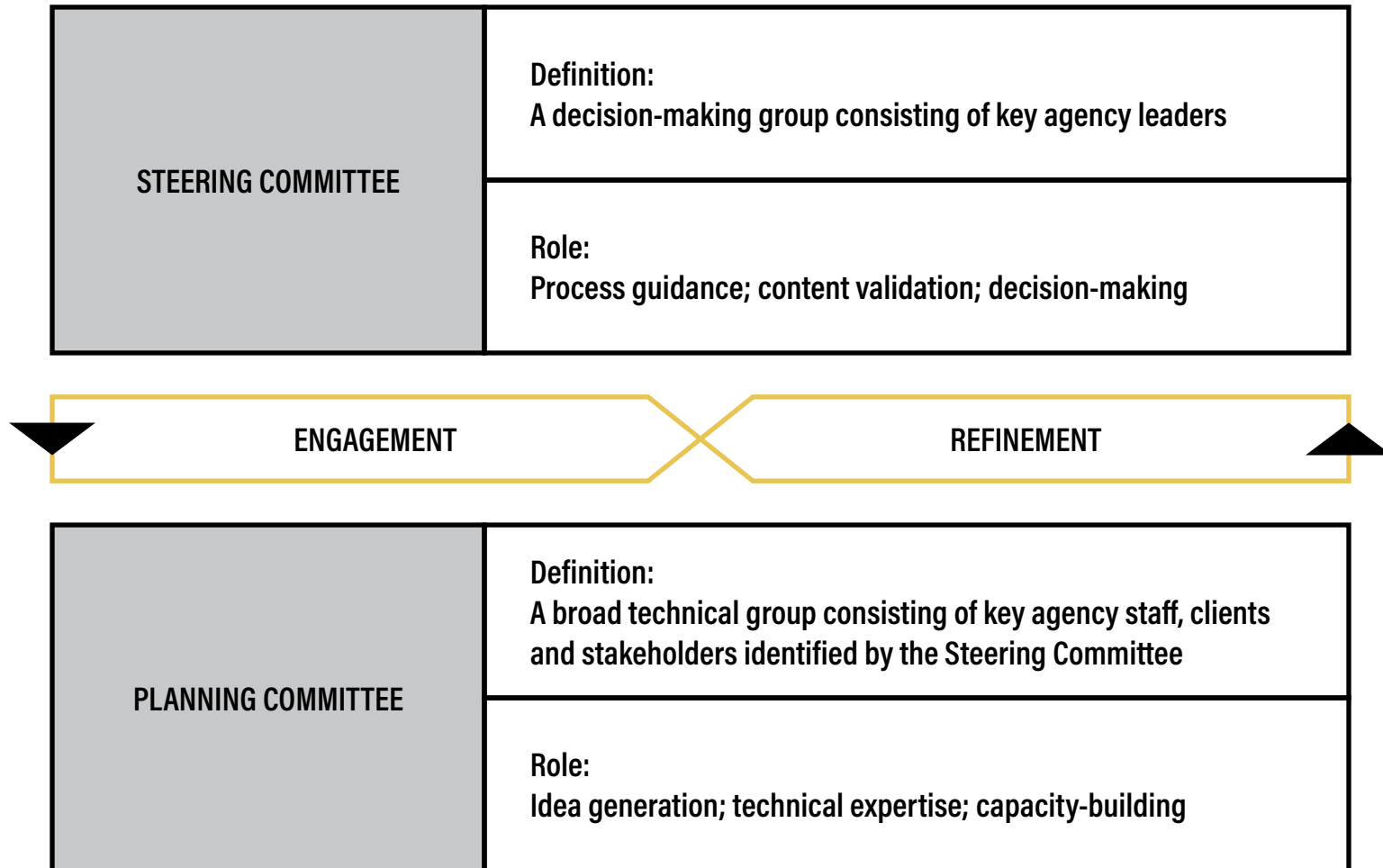
STRATEGIC FACILITIES PLANNING PROCESS/ORIENTATION



STRATEGIC FACILITIES PLANNING PROCESS/STEPS



STRATEGIC FACILITIES PLANNING PROCESS/STRUCTURE



STRATEGIC FACILITIES PLANNING PROCESS/PREPARE



PREPARE	
MISSION/MANDATE	Review agency mission; What are the agency's statutory operational requirements, and how do they translate to facilities and space needs?
VALUES/PRINCIPLES ¹	What are the agency's values and principles in regards to planning for facilities?
ISSUES/TRENDS	Over the next ten years, what are key issues/trends that may impact how the agency fulfills its mission and the need for facilities? (e.g. socio-economic trends, cultural shifts, work modality)
DEMAND FACTORS	What are the key factors that determine your agency's facility and space needs? These factors are both internal (policies) and external (legal, environmental).

¹See DAS Capital Planning Principles (Example 1)

STRATEGIC FACILITIES PLANNING PROCESS/ENGAGE



ENGAGE	
VISIONING	A collaborative engagement process to envision desirable long-range outcomes. This effort is generally focused on facilities, but may be informed by the agency's organizational strategic vision.
ORGANIZATIONAL ASSESSMENT	An (optional) process to examine internal/external factors that have strategic consequence to the agency's facilities or facilities-related operations.
OPPORTUNITIES/CHALLENGES	An (optional) process that examines facilities-related opportunities and challenges to help identify problems addressed/resolved through strategic interventions.
TOOLS	Internet surveys; small-group discussions; field visits; maps

FORMULATE	
VISION ²	A synthesized output of the visioning process; a declarative statement of a desirable future (ten-year) state, and related attributes thereof.
GOALS AND OBJECTIVES ³	Statements defining the desired future outcomes and targeted achievements (objectives) that will realize the vision.
STRATEGIES AND ACTIONS	What does the agency need to do (over the next ten years) to realize the Vision? What specific actions (e.g. projects, policies) can the agency undertake to achieve its goals and objectives?
BENCHMARKS	How will the agency know if it's achieving its goals? What are specific measurements to help understand the agency's progress or performance?

²See DAS Strategic Facilities Vision (Example 2)

³See DAS Strategic Facilities Goals and Objectives (Example 3)

STRATEGIC FACILITIES PLANNING PROCESS/**ANALYZE**



ANALYZE	
SUPPLY	An analysis of the agency's facility suitability, including location, condition, and functionality, over the next ten years.
DEMAND	An analysis of the agency's estimated ten-year demand for facilities and/or space. This may be driven by projected growth/contraction in specific program needs, geographic service areas, or the agency's workforce.
GAP (NEED)	The variance between Supply and Demand, and may result in aggregate space increase/reduction, geographic reorganization of existing facilities, potential new facilities, and priority maintenance/capital renewal.
OPTIMIZATION	What are specific agency initiatives/projects that will optimize mission/program delivery, minimize facility needs, and maximize goal achievement? These initiatives/projects are typically synergistic and transformative in nature, and may depend on other agency support to realize.

SYNTHESIZE	
STRATEGIC PLAN	A formalization of the strategic planning process that reconciles an agency's long-range vision with an its ten-year facility needs. The Plan is comprised of a strategic framework (Vision, Goals and Objectives) with an Action consisting of specific projects/activities and timeline.
ACTION/TACTICAL PLAN	What are specific actions/tactics (e.g. policies, projects) needed to achieve the goals and objectives? Who is responsible for performing, managing, or implementing the action?
TIMELINE	What is the strategic sequence of actions that will occur over the next ten years? How can the timing of these actions be optimized based on available resources or other constraints? Strategic Plans are effective at demonstrating appropriate rationale for securing public funding sources (capital funds).
TOOLS	Map-based visualizations; project management tools

STRATEGIC FACILITIES PLANNING PROCESS/IMPLEMENT



IMPLEMENT	
POLICIES	Development of key policy changes to help the agency achieve it's strategic facilities goals.
PROJECTS	A list of strategic capital projects identified in the agency Action/Tactical Plan. Projects funding requests are sequenced to align with the biennial state budgeting process. In addition, agencies can develop a Facilities Master Plan, which are site-specific project plans.
BENCHMARKING	Define key performance measures and begin tracking progress.
TOOLS	Dashboards of key performance measures.