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Strategically Incorporating  
Sustainability, Resilience, and  
Footprint Consolidation in Portfolio  
Planning  
Workshop 2  
Oct. 27, 2015

# Review of Workshop 1 (9/14/15)

- Over 200 registrants (in person and via webex)
- Speakers from:
  - US General Services Administration
  - US Department of Defense
  - US Air Force
  - US Department of State
  - US Army
  - US Department of Veterans Affairs
  - Lawrence Livermore Labs
  - US Architect of the Capitol
  - Arizona State University
  - IBM
  - Tishman Speyer

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# Major Findings

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# General

- More projects than money broadens decision framework
- Diversity of approaches to address sustainability, resilience, and footprint consolidation in portfolio prioritization
- Diversity of time horizons and regional scales

## Opportunity for:

- More Uniform Frameworks And Approaches
- Shared Data, Tools, Solutions
- Balanced Use of Data that Leads to Action

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# Portfolio Prioritization and Management

- Significant progress in new construction and major renovation
- Significant challenges in existing buildings (constitute majority of portfolio)

## Opportunity for:

- Strategic Prioritization - planning “next steps” for each facility across portfolio to avoid wasted cost, time, effort
- Strategic Factors – address sustainability, resilience, space utilization in budget allocation and decision-making
- Strategic Coordination with Operations

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# Regional Issues

- Major Regional Differences in Risks, Access to Critical Services, and Finances
- Regional Data available to enable decision-making

## Opportunity for:

- Regional Partnerships for Risk Analysis, Planning
- Regional Federal, State, Tribal, Local Partnerships for Portfolio Prioritization and Solution Implementation

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# Risks

- Facility mission is critical for all Portfolio Prioritization Decisions
- Risks can be “Acute” or “Chronic”
  - Operations Risks
  - Financial Risks
  - Health/Safety Risks
  - Climate Change Impacts
- Facility Risks include Access to Critical Services (Energy, Water, Transportation, Communications)

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# Tools

- Real-Time Performance Monitoring and Continuous Commissioning
- “True Value” Calculations of Critical Resources
- “Social Cost” Calculations of By-Products
- Failure Probability Analysis – with cascading impacts
- Portfolio Prioritization within Strategic Plan, Installation Development Plan

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# Solutions

- Bundling Increased Efficiency (Resources, Space) with On-site Generation (Energy, Water)
- Bundling Improvements (Resilience, Sustainability, Footprint Consolidation)
- Incorporating Future Accommodation (New Roof with PV Mounts)
- Coordination/Partnership Across Multiple Buildings
- Operational Changes (Telework/Hoteling)

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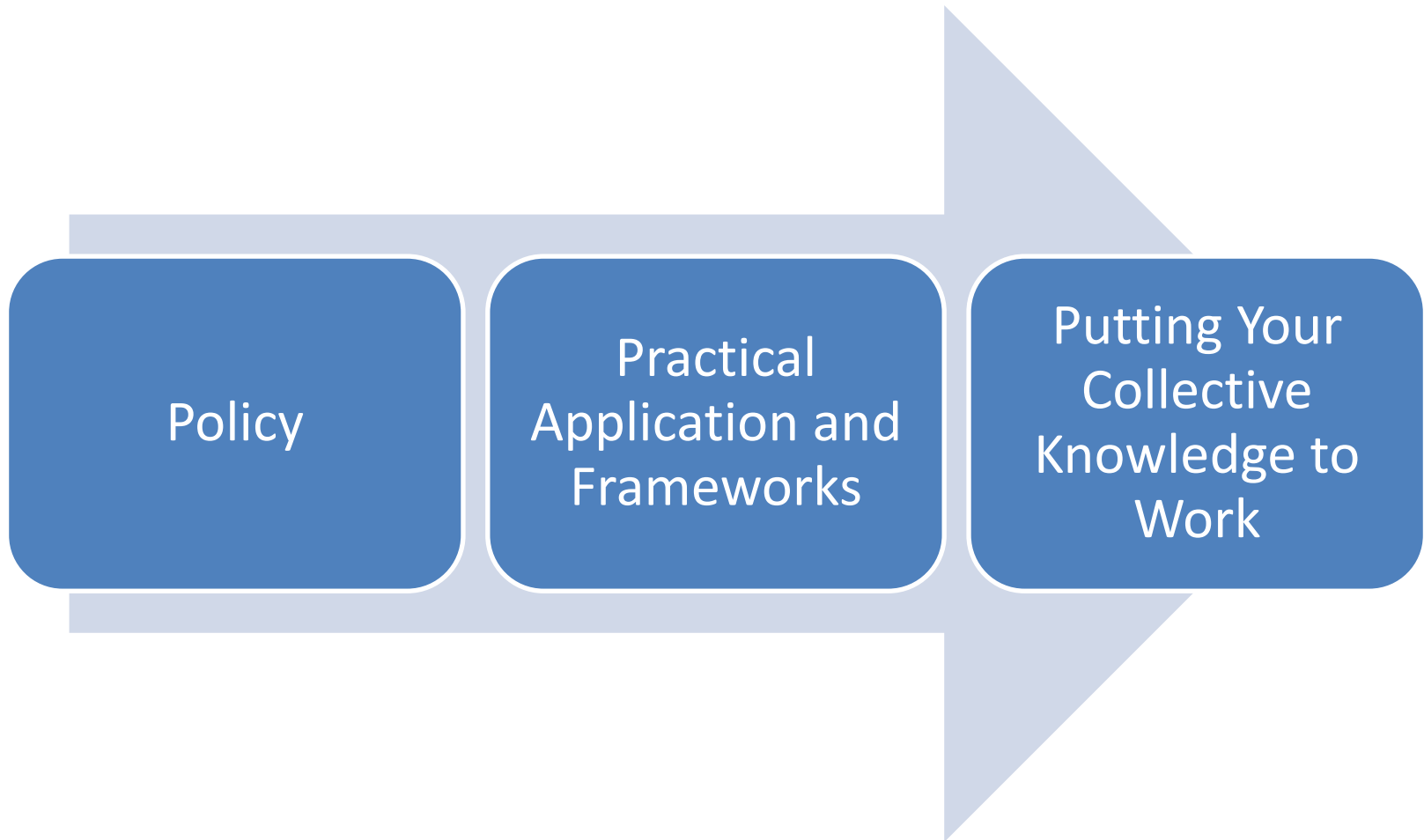
# Portfolio Prioritization Tool

## “Wish List”

- Incorporates Risk Assessment and Mitigation
- Addresses Regional and Local Levels
- Cross Organizational
- Scales from Individual Facilities to Full Portfolio
- Coordinates Portfolio Planning and Facility Operations
- Highlights Mission Critical Buildings, Facilities, and Infrastructure
- Assesses Existing Buildings
- Easy to Use and Update
- Incorporates Multiple Solutions/Bundles

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# Workshop II Outline



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# Breakout Sessions

**Scenario 1: Sustained O&M Budget with Utility cost increases  
(Board Room)**

**Scenario 2: Net Zero Energy and Water for Mission Critical  
Facilities (Members Room)**

**Scenario 3: One-time \$10B Infrastructure Investment in Agency  
(Room 120)**

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# The Ask

- **Practical strategies, tools and resources for economically evaluating and incorporating sustainability, resilience and footprint consolidation into the portfolio prioritization process;**
- **Criteria and/or data needs (e.g., facility hazard vulnerability) for this integration of goals;**
- **Ways in which federal guidance may encourage more strategic incorporation of these factors into portfolio decision-making;**
- **Opportunities for process improvement.**

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# Some Questions

- **Do federal agencies currently prioritize investments effectively and measurably in regard to sustainability and resilience?** Is there significant room for improvement?
- **What do you know now** – what information and data are already available to support decision making? What are some of the prioritization and planning tools and resources being used?
- **What do you need to know** – what information is needed to make an informed strategic decision? What sorts of tools and resource could do the most to help achieve this goal?
- **How do you bring together the necessary expertise?** – organizationally, where do agency experts and implementers on portfolio planning, asset management, sustainability, resilience (etc.) sit and what are both the organizational barriers between and effective connections among them?

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