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
Major Findings
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
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
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
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)
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
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)
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
Workshop II Outline

Policy

Practical Application and Frameworks

Putting Your Collective Knowledge to Work
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)
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.
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?