



GSA Public Buildings Service

Client Enrichment Series



Welcome to today's Presentation:

- **Managing and Rightsizing Your Portfolio**
- **March 18th, 2026**
- **The presentation will start at 1:00 pm Eastern**

Note:

- ❑ Phones are automatically muted during the presentation.
- ❑ You can send questions to our presentation team via your Q&A pane and team will answer as many questions as possible during the presentation.
- ❑ All questions will be responded to in writing in a formal Q&A document, posted along with the slide deck and session recording, on our website, <http://www.gsa.gov/ces>

Meet the *Presented by* Speakers



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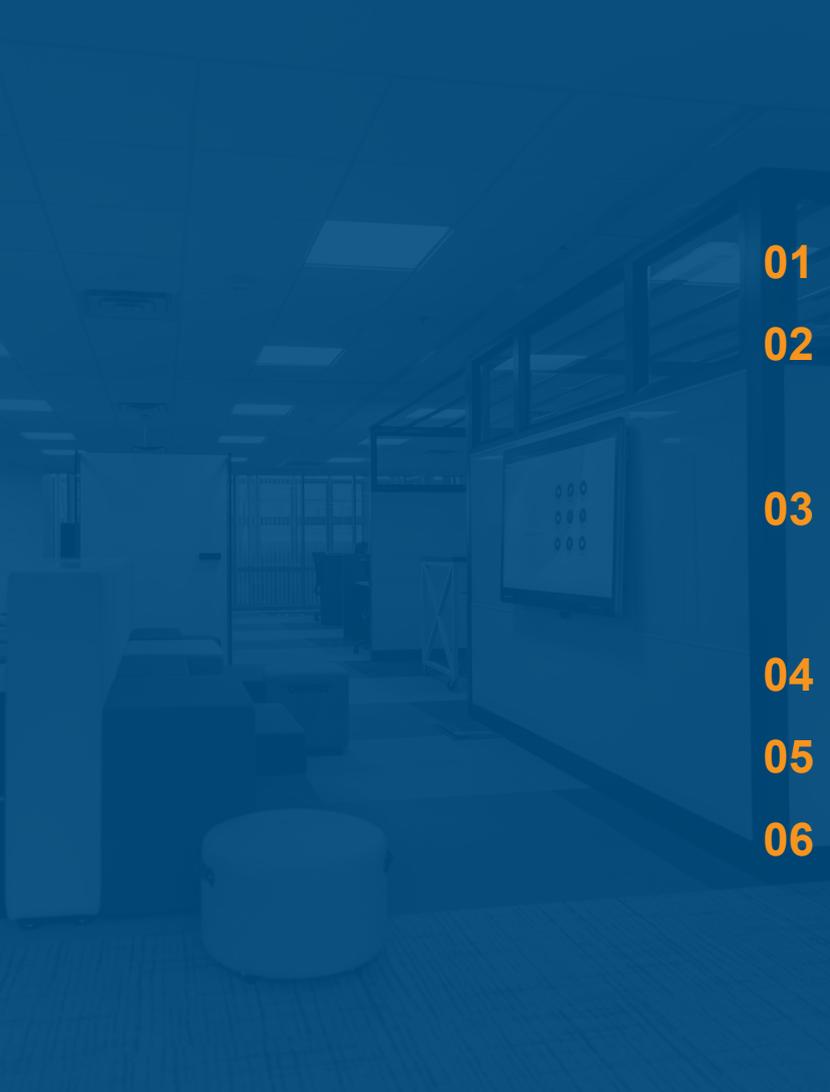


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Agenda

- 01** Prioritizing the Right Occupancy Projects
- 02** Working together on your Targeted Occupancy Projects
- 03** How GSA can help with your underutilized/excess space
- 04** Keys to Successful Occupancy Planning
- 05** Resources: Things to “Bookmark”
- 06** Q&A

Section Divider Prioritizing the Right Occupancy
Projects

01

Prioritizing the Right Occupancy Projects

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Occupancy Planning - What Drives Our Engagement?

Moving BEYOND lease expiration as the trigger for planning
Evaluating more risks and opportunities



New Requirements

Mission-priority agency space needs not currently in GSA's real estate inventory



Dispositions

Relocating an agency due to a GSA building disposition



Low Utilization

Leased and federally owned occupancies with costly low utilization and occupancy metrics

Detailed Planning for Targeted Occupancies

Engage

- Client Strategist leads planning and occupancy prioritization discussion
- Agencies partner to prioritize the right projects
- Agency submits targeted strategic requirements in space intake portal

Comprehensive Analysis

- Client Strategy and SMEs review and analyze your overall space needs and strategic requirements
- Partner to improve WRDA ([USE IT Act](#)) and [OMB Memo M-25-25](#) alignment (Executive agencies only)

Housing Strategy

- Identify optimal space solution (federal backfill, intra-agency consolidation, new lease, etc.)
- Complete a Client Project Agreement outlining high-level space parameters and housing strategy



Drive solutions that meet your mission, promote cost-effective space utilization, and leverage shared spaces where possible.

Programmatic Approach for the Remaining Project Portfolio

Verify

- Client Strategist partners with you to verify there's no elevated risks or significant opportunities
- Agencies share intel and inject top priorities
- Agree to low-resource strategies for specified portfolio

Simplified Documentation

- Low touch, no full requirements development
- Bundled / programmatic CPAs
- Programmatic cost analysis

Execute

- GSA's project execution business lines work to expedite solutions
- Bundling, brokers and bots
- Pivot when strategy busts



Use minimal resources to protect occupancy and continue existing cost-effective spaces.

Client Agency Benefits

- Improved utilization
- Cost avoidance
- Realistic budgeting and move readiness
- Resource efficiency
- Fewer, yet timely, requirements
- Soft-term cost-saving opportunities

Workin together on your targeted occupancy projects

02

Working Together On Your Targeted Occupancy Projects

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PBS Project Lifecycle

Closeout

5

- Final inspections/punch list
- OA finalized to begin rent payments
- Facilities Management administers the occupancy

1

Identification



- Agency submits strategic requirements into the Space Intake Portal
- Determine future housing plan and finalize CPA
- Obtain Internal /external agreement on the CPA

4

Execution

- Determine final requirements package
- Request lease/RFP issued
- Approved OA prior to contract award
- Project award/design/construction

GSA Project Lifecycle

2

Initiation

- Project Manager assigned
- Project team develops project charter and develops technical requirements

3

Planning

- Finalize the Program of Requirements
- Finalize project management plan, schedule, and budget
- Obtain funding commitment

Process: Occupancy Planning through Identification

Occupancy Planning & Prioritization

Annual partnership optimizing your footprint and mission through strategic analysis and occupancy prioritization.

- Prioritize the right occupancy projects
- Determine programmatic stay in place occupancies

Space Needs Identification

Your agency requests and gains access to the portal to submit your initial space needs.

- Receive a project specific link to the portal
- Submit your agency's strategic requirements through the portal link

Refine Strategic Requirements

We collaborate with your agency to refine and validate your strategic requirements.

- Our Client Strategists (CS) work with your agency to refine your requirements
- We conduct a comprehensive review of your submission
- Assist your agency in meeting occupancy and utilization metrics
- A housing strategy is determined

Finalize Strategic Requirements

Agreement on project parameters is reached between GSA and your agency.

- A Client Project Agreement (CPA) is completed and shared with your agency
- Your agency acknowledges project parameters and approves the CPA

Transition to Project Management

With the CPA finalized, a Project Manager is assigned to lead project implementation, transitioning from planning to execution

- The project transitions to execution with PM assignment.
- The PM sets up a meeting with your agency to begin developing technical requirements.

If you have a new requirement or expansion need, notify GSA through the new requirement request form

Space Intake Portal

What:

- Critical entry point for agency space requirements
- Initiates strategic planning process
- Qualtrics survey

Why:

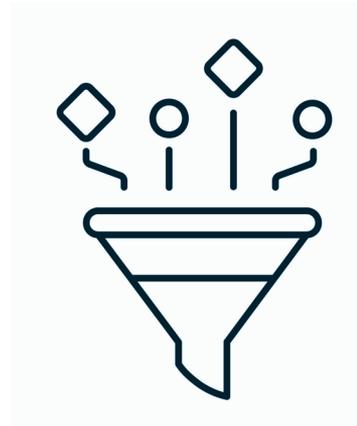
- Streamlines space requirement submissions
- Gather comprehensive data to inform housing strategies
- Develop a tailored housing strategy, identifying optimal space solutions

Who:

- Federal agency real estate decision-makers and their authorized delegates

When:

- Unique links will be sent once occupancies have been identified to begin planning activities



Space Intake Portal Adapts to You



Dynamic

Like a “choose your own adventure,” the portal asks different questions based on your specific needs.



No One-Size-Fits-All

You indicate the space needs and unique requirements which trigger relevant questions—others are skipped entirely.



Efficient Experience

Ensures a streamlined and efficient process, saving you time and effort.

Examples:



- Have special space USF needs?
Get special space questions



- Have office only USF needs?
Don't get special space questions



Bottom Line: *Every agency's journey through the portal is different because your space needs are different.*

Space Requirements for New and Existing Occupancies



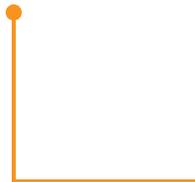
New Requirements

Agency initiated through a new requirement request form



Existing Occupancies

Identified through occupancy planning discussions



You will receive a unique link for your project when GSA is ready to receive your requirements.



Submitting a New Requirement Request

New Requirement Request Form



Agency POC



Agency/Bureau name



Location of space need



Timing



Space need description



OA # (*expansions only*)

1. Complete the request form



2. GSA may contact you for clarification



3. Unique links to the portal will be sent out weekly on Thursdays.



Submitting Your Requirements to GSA

The portal will ask a series of questions based on our Client Project Agreement



Key agency contacts

Key personnel required for the space request process.



Basic space requirements

Location, duration, headcounts, mission/operational needs



Square footage needs

Office/office support, special spaces, warehouse, antennas & parking



Unique requirements

Location and space constraints, operational and access needs, security and critical system



Occupancy and Utilization

General type of work and projected daily occupancy



Note: The portal allows for document uploads for supporting information

What to Expect After Submission



Communicate

- Client Strategist will reach out to begin discussions on your project



Comprehensive Analysis

- We will review and analyze your requirements
- Evaluate WRDA (USE IT Act) and OMB Memo 25-25-
Executive level agencies only



Housing Strategy

- Develop a housing strategy, identifying optimal space solutions
- Provide you with Client Project Agreement, outlining high-level space parameters and housing strategy

Goal: To drive solutions that meet your mission, ensure optimal utilization and leverage existing spaces and shared spaces where possible.

Housing Solutions For Your Occupancies

Shared Space

- Space Match program
- Commercial Co-working
- Typically less than 20 seats needed

Vacant Space Backfill

- Owned/ Existing Lease with Vacancies: For urgent, long-term space; significant lease term left.
- Active Dispositions with Vacancies: Only for short-term emergency space.

New Lease

If no federal housing solution is available to fulfill the space request, GSA will consider a new lease request.

Co-locations & Consolidations

- 2 or more agencies in the same building
- Agency-specific operational control where necessary
- Fully shared spaces or separate work areas
- New lease or consolidation

Transition to Project Management



Approve the CPA

This acknowledges your agency agrees on the project parameters



Project Manager Assigned

A Project Manager will be assigned to your project who will set up a meeting to begin developing your technical requirements.

How GSA can help with your underutilized/excess space

03

How GSA can help with
your underutilized/excess
space

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Optimizing Your Underutilized Space

Space Releases (OASIS)

- Full or partial reduction of your space
- Space is in marketable blocks
- OA is not non-cancelable
- At least 16 months into the OA term
(leased occupancies only)

Underutilized Space Identification Portal

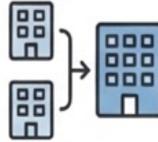
- Want to partner with GSA to identify and recommend potential strategies to help drive better utilization and occupancy levels
- GSA-controlled space only

Optimization Strategies for Underutilized Space



Space Sharing

- Interagency space-sharing
- Provides supply for agencies looking for space
- Increases your utilization



Consolidation

- Evaluating your multiple occupancies in the market
- Potential to combine one or more of your occupancies into your space



Space Release

- Evaluate costs and options for releasing your space
- Partial or full releases



Section Divider - Keys to Successful Occupancy Planning

04

Keys to Successful Occupancy Planning

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Working together for a successful result

Your agency's role in successful occupancy planning:



Submit Comprehensive Space Requirements

- Provide detailed needs upfront
- Reduce need for clarifications



Engage Early in the Planning Process

- Communicate space needs proactively
- Maximize available options



Collaborate to Optimize Space Utilization

- Identify efficiency opportunities
- Align space with workforce needs
- Maximize operational effectiveness
- Leverage our joint expertise



Section Divider Resources: Things to “Bookmark”

05

Resources: Things to
“Bookmark”

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Resources for you

- Portfolio Planning website (gsa.gov/portfolioplanning)
 - Space Intake Portal training videos
 - Underutilized Space Identification Portal
 - New Requirement Request Form
- Occupancy and Utilization Guidelines (gsa.gov/real-estate/use-it-act-and-occupancy-data)
- PBS Points of Contact (gsa.gov/real-estate/pbs-points-of-contact)
- Previous CES information: [GSA website](#), [YouTube channel](#)



Section Divider – Q&A

06 Q&A

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Join us for our upcoming VIRTUAL CES session

Meeting the Needs of Workplace in an Evolving Environment

Wednesday, April 15

1:00 PM ET

[Register Now](#)



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