APPENDIX A

Department of Health and Human Services
Office for Facilities Management and Policy
Real Property Asset Management
President's Management Agenda – Goals and Milestones

as of 26 November 2007

Guide to Goal/Milestone Identification Number: • 3.3.8 -- Oversight of the HHS Portfolio Initiative • TYTL.4 -- Three Year Timeline Goal/Milestone • PMA 1.3 -- PMA Departmental Scorecard Action

Due - Quarter	Due - Year	Annually Recurring?	RAMP Goal	Goal/ Milestone Identification Number	Initiative/Goal/Milestone Identification	Initiative/Goal/Milestone Description	Deliverable	Where located	Lead Responsibility
1Q	2008	No	5	3.3.1	Verification and Validation Process – ARIS data	Revised submitted verification and validation plan based on OMB comments received as part of the 4Q FY 2007 PMA scorecard submission	Revised Verification and Validation Plan (Due 11/01/07)	Page 18 and 30, Oversight of the HHS Portfolio Document	ARIS Workgroup/OFMP
1Q	2008	Yes	5	3.3.1	Verification and Validation Process – ARIS data	Perform "desktop" validation on ARIS data in preparation of the annual upload to ARIS and finally FRPP	ARIS Upload (Due 11/15/07) / FRPP (12/14/07)	Page 18 and 30, Oversight of the HHS Portfolio Document	OPDIVs / OFMP
1Q	2008	No	2	3.3.12	Revise and Elaborate Methodology for Internal Scorecards	Develop new OPDIV internal scorecard with implementation policy and guidance	OPDIV internal scorecard with guidance	Page 22, 28 and 33, Oversight of the HHS Portfolio Document	Tiger Team
1Q	2008	No	2	3.3.13	Revise 3-Year Timeline Report	Revise 3-Year Timeline Format with Tiger Team recommendations	FY 2008 Revised 3-Year Timeline (Due 11/26/07)	Page 23, 29 and 33 Oversight of the HHS Portfolio Document	Tiger Team
1Q	2008	No	1	3.3.2	Adequate Workforce to lead and direct in Department functional areas of expertise	Develop an OFMP Human Resource Management Plan	HHS OFMP Human Resource Management Plan	Page 19, 24 and 33 Oversight of the HHS Portfolio Document	OFMP
1Q	2008	Yes	2	3.3.3c	Adjust baseline figures for HHS Performance Targets – Assess current HHS Performance Targets for utilization, mission dependency, operating costs and condition, and revise interim targets as determined necessary by the SRPO	OFMP on behalf of the SRPO to evaluate previous quarter's data to track land holding OPDIV progress towards meeting Departmental performance targets to "right size" the HHS portfolio of assets.	SRPO specific progress reports to OPDIVs	Page 19, 25 and 33 Oversight of the HHS Portfolio Document	OFMP
1Q	2008	No	1	3.3.5	Develop the requirement for and recruit OFMP Master Planner Position	Define master Planner position description with specific KSAs	HHS OFMP Master Planner PD	Page 19, 24 and 33 Oversight of the HHS Portfolio Document	OFMP
1Q	2008	No	5	3.3.6	Standardize HHS Assumptions to Further Define FRPC Measures	Review FRPC definitions and guidance and determine which elements require additional clarification by the Department. Prioritize needs. Begin standardization process.	Status Report	Page 19, 24 and 33 Oversight of the HHS Portfolio Document	O&M, Utilization, Mission Dependency Performance Measure Work Groups review and develop; OFMP/Tiger Team review and coordinate policy
1Q	2008	No	2	3.3.8	Delegate the CIRB Chair to the SRPO	Transfer delegation of CIRB chair to SRPO.	Delegation authority document	Page 21, 26 and 33 Oversight of the HHS Portfolio Document	SRPO
1Q	2008	No	2	3.3.9	Establish Standard Templates for reporting use of inventory data and performance data in day-to-day decision making for owned and leased assets	Form a working group to review OMB "Getting to Green" examples; evaluate existing OPDIV tools to identify Best Practices; review current examples of OPDIV use of data; benchmark with other federal agencies; and finalize reports calendar	Status report and reports calendar	Page 21, 27 and 33 Oversight of the HHS Portfolio Document	Tiger Team
1Q	2008	No	2	PMA.1.1	Lease Property Portfolio Management	Identify specific corrective actions to be taken in FY08 to improve lease management	Report	4Q Departmental PMA Scorecard	Tiger Team
1Q	2008	No	2	PMA.1.2	HHS Real Property Asset Management	Identify long term goals and incorporate all short, medium, and long term goals into the 3-Year Timeline	Draft FY 2008 Revised 3-Year Timeline and Updated Oversight of Portfolio Document – Due 11/26/07	4Q Departmental PMA Scorecard	Tiger Team
1Q	2008	No	2	PMA.1.3	HHS Real Property Asset Management	Finalize the Proud to Be V	Proud to Be V Document – Due 11/15/07	4Q Departmental PMA Scorecard	OFMP

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1Q	2008	Yes	5	TYTL.4	ARIS Certification	OPDIVs certify the 1) accuracy and completeness of portfolio data in ARIS 2) completion of OPDIV 3-Year Timeline goals/milestones/targets (Quarterly for Landholders / Annually 4Q for non-landholders)	Certification Statements with required supporting documentation for data changes	TBD	OPDIVs
1Q	2008	Yes	2	TYTL.6	Real Property Portfolio Disposition/Demolition/ Lease Consolidation List	Report quarterly progress toward meeting HHS FY08 disposal target	Status Report	PTB V, pages 5, 6, 8	OPDIVs submit to OFMP
1Q	2008	No	2	3.3.10	Pursue (not implement) Recommended Action from Enhanced Ral Property Authority	Identify eligible OPDIV properties	Status report and list of properties.	Page 21, 28 and 33, Oversight of the HHS Portfolio Document	Tiger Team / OPDIVs
1Q	2008	No	2	3.3.7	Establish Annual Board Meeting for Master Plan	Establish semi-annual CIRB meetings to address: 1) budget including sustainment/improvement funding and other funding issues, 2) master planning to include overall management of portfolio issues.	Policy documentation delineating the specific purpose of each meeting; establishing membership, protocols, and standard agenda; and defining specific approval actions	Page 20, 26 and 33 Oversight of the HHS Portfolio Document	SRPO with OFMP
2Q	2008	No	5	3.3.3b	Adjust baseline figures for HHS Performance Targets -- Assess current HHS Performance Targets for utilization, mission dependency, operating costs and condition, and revise interim targets as determined necessary by the SRPO	Analyze FRPC data from previous years and prioritize adjustment actions determined through the analysis process. In conjunction with 3.3.6 and 3.3.11 develop standard calculations and assumptions for variables and implement their use.	1. Status Report 2. Include with Budget Technical Guidance	Page 19, 27 and 33 Oversight of the HHS Portfolio Document	O&M, Utilization, Mission Dependency Performance Measure Work Groups review and develop; OFMP/Tiger Team review and coordinate policy
2Q	2008	No	5	3.3.6	Standardize HHS Assumptions to Further Define FRPC Measures	Complete standardization process. Issue HHS standard definitions and guidance as policy.	Policy and Guidance document.	Page 19, 24 and 33 Oversight of the HHS Portfolio Document	O&M, Utilization, Mission Dependency Performance Measure Work Groups review and develop; OFMP/Tiger Team review and coordinate policy
2Q	2008	Yes	5	PTB V	Improved Data Sharing	Implement the common Federal transfer screening format and performance measures	Policy and guidance for implementation	PTB V, page 7	OFMP
2Q	2008	Yes	3	TYTL.1	Annual Budget Guidance	Incorporate all aspects of real property as it relates to the budget with an analysis of data into budget technical guidance and provide to each OPDIV	Budget Technical Guidance	TBD	OFMP
2Q	2008	No	2	TYTL.10	Utilization Performance Measures for Owned Constructed Assets	Finalize a utilization improvement plan for owned constructed assets	Utilization Plan, implementation and guidance documentation	TBD	Utilization Performance Measures Work Group
2Q	2008	Yes	ALL	TYTL.2	Annual Update of HHS RAMP	Complete a revision of the HHS Real Property Asset Management Plan (RAMP) to include an evolution of HHS Asset Management processes since the initial plan and to incorporate OMB approved 3-Year Timeline (TYTL) updates.	HHS RAMP	TBD	OFMP

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2Q	2008	Yes	5	TYTL.4	ARIS Certification	OPDIVs certify the 1) accuracy and completeness of portfolio data in ARIS 2) completion of OPDIV 3-Year Timeline goals/milestones/targets (Quarterly for Landholders / Annually 4Q for non-landholders)	Certification Statements with required supporting documentation for data changes	TBD	OPDIVs
2Q	2008	No	2	TYTL.5	Post Occupancy Evaluation	Implement standard Post Occupancy Evaluation format, policy, and guidance	Policy and Guidance document.	TBD	OPDIVs
2Q	2008	Yes	2	TYTL.6	Real Property Portfolio Disposition/Demolition/ Lease Consolidation List	Report quarterly progress toward meeting HHS FY08 disposal target	Status Report	PTB V, pages 5, 6, 8	OPDIVs submit to OFMP
2Q	2008	No	5	3.3.1	Verification and Validation Process – ARIS data	Develop standardized validation forms and provide field validation training	Report	Page 18, 30 and 33, Oversight of the HHS Portfolio Document	ARIS Workgroup
2Q	2008	No	2	3.3.10	Pursue (not implement) Recommended Action from Enhanced Real Property Authority	Gain OGC/ASL approval	Status report and request for approval.	Page 21, 28 and 33, Oversight of the HHS Portfolio Document	Tiger Team
2Q	2008	No	3	3.3.11	Capture accurate operations and maintenance (O&M) costs	Develop an HHS Operations and Maintenance Costing Plan	HHS Operations and Maintenance Costing Plan	Page 22, 29 and 33, Oversight of the HHS Portfolio Document	O&M Workgroup
2Q	2008	Yes	2	3.3.3d	Adjust baseline figures for HHS Performance Targets – establish annual analysis to verify that targets continue to be aligned with established needs of the SRPO	Incorporate real property requirements and annual evaluation of data to track land holding OPDIV progress towards meeting Departmental performance targets to "right size" the HHS portfolio of assets into Budget Technical Guidance.	As part of the Budget Technical Guidance the SRPO provides annual analysis to OPDIV	Page 19, 27 and 33 Oversight of the HHS Portfolio Document	OFMP
2Q	2008	Yes	2	3.3.4	OFMP to develop an analysis to evaluate asset data using PAT (Disposition Decision Tree) and provide analysis to OPDIVs	For selected assets from each land holding OPDIV's portfolio, OFMP will perform an analysis utilizing PAT (Disposition Decision Tree) based on the current data in ARIS and provide a report of the results to the specific OPDIV.	OFMP report to each OPDIV	Page 19, 26 and 33 Oversight of the HHS Portfolio Document	OFMP
2Q	2008	No	2	3.3.9	Establish Standard Templates for reporting use of inventory data and performance data in day-to-day decision making for owned and leased assets	Develop standard "template" from Best Practices; distinguish requirements, if needed, between ASAM/Board level and OPDIV level. (Day-to-Day Decision making)	Status report and template.	Page 21, 27 and 33 Oversight of the HHS Portfolio Document	Tiger Team
3Q	2008	Yes	5	3.3.1	Verification and Validation Process – ARIS data	Onsite validations are conducted by the OFMP and the OPDIVs to field verify the data in ARIS	Report	Page 18, 30 and 33, Oversight of the HHS Portfolio Document	ARIS Workgroup
3Q	2008	No	2	3.3.10	Pursue (not implement) Recommended Action from Enhanced Real Property Authority	Gain OMB approval and draft legislation or delegation as required by GSA	Status report, request for approval and draft legislation	Page 21, 28 and 33, Oversight of the HHS Portfolio Document	Tiger Team
3Q	2008	No	3	3.3.11	Capture accurate operations and maintenance (O&M) costs	Implementation of HHS Operations and Maintenance Costing Plan.	HHS Operations and Maintenance Costing Plan Policy and Implementation Guidance	Page 22, 29 and 33, Oversight of the HHS Portfolio Document	O&M Workgroup

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3Q	2008	No	5	3.3.3c	Adjust baseline figures for HHS Performance Targets – Assess current HHS Performance Targets for utilization, mission dependency, operating costs and condition, and revise interim targets as determined necessary by the SRPO	Revise interim targets as recommended by WGs and approved by OFMP and SRPO. Implement final standard calculations and assumptions policy with guidance.	Policy and Guidance document	Page 19, 27 and 33 Oversight of the HHS Portfolio Document	O&M, Utilization, Mission Dependency work groups then with full recommendations review by OFMP/Tiger Team
3Q	2008	Yes	2	3.3.3c	Adjust baseline figures for HHS Performance Targets – Assess current HHS Performance Targets for utilization, mission dependency, operating costs and condition, and revise interim targets as determined necessary by the SRPO	OFMP on behalf of the SRPO to evaluate previous quarter's data to track land holding OPDIV progress towards meeting Departmental performance targets to "right size" the HHS portfolio of assets.	SRPO specific progress reports to OPDIVs	Page 19, 25 and 33 Oversight of the HHS Portfolio Document	OFMP
3Q	2008	Yes	2	3.3.3e	Adjust baseline figures for HHS Performance Targets – SRPO to provide a Consolidated Corrective Action Plan report.	SRPO provides annual analysis to OPDIVs as part of budget technical guidance in 2Q; In 3Q OPDIVs provide OPDIV report to SRPO; SRPO provide Department Consolidated Corrective Action Plan	SRPO Consolidated Corrective Action Plan with OPDIV Reports	Page 19, 25 and 33 Oversight of the HHS Portfolio Document	OFMP; OPDIV reporting requirement
3Q	2008	No	1	3.3.5	Develop the requirement for and recruit OFMP master Planner Position	Recruit master Planner	Solicitation for Master Planner	Page 19, 24 and 33 Oversight of the HHS Portfolio Document	OFMP
3Q	2008	No	2	3.3.9	Establish Standard Templates for reporting use of inventory data and performance data in day-to-day decision making for owned and leased assets	Develop implementation plan and guidance for day-to-day decision making process.	Status report, implementation plan and guidance	Page 21, 27 and 33 Oversight of the HHS Portfolio Document	Tiger Team
3Q	2008	Yes	3	TYTL.11	Operations and Maintenance Performance Measures for Owned Assets	O&M Best Practices Strategy Document – review and update annually as required by results of the review	Report of review and any changes	TBD	O&M Performance Measures Work Group
3Q	2008	Yes	5	TYTL.4	ARIS Certification	OPDIVs certify the 1) accuracy and completeness of portfolio data in ARIS 2) completion of OPDIV 3-Year Timeline goals/milestones/targets (Quarterly for Landholders / Annually 4Q for non-landholders)	Signed Certification Statement with required supporting documentation for data changes; and accurate, complete transmission of the ARIS database.	TBD	OPDIVs
3Q	2008	Yes	2	TYTL.6	Real Property Portfolio Disposition/Demolition/ Lease Consolidation List	Report quarterly progress toward meeting HHS FY08 disposal target	Status Report	PTB V, pages 5, 6, 8	OPDIVs submit to OFMP
3Q	2008	Yes	2	TYTL.6	Real Property Portfolio Disposition/Demolition/ Lease Consolidation List	Project FY09 candidate property list for HHS assets	FY 2009 Report of Projected HHS Real Property Portfolio Planned Actions	TBD	OPDIVs submit to OFMP
3Q	2008	Yes	2	TYTL.7	Real Property Portfolio Disposition/Demolition/ Lease Consolidation List	Report status on progress towards meeting FY08 portfolio management targets	Annual Status Report for Real Property Portfolio Planned Actions	TBD	OPDIVs submit to OFMP
3Q	2008	Yes	2	TYTL.9	Lease Property Portfolio Management	Review leasing performance measures to assess effectiveness and ascertain if any changes or improvements are required	Status Report	TBD	Lease Performance Measures Work Group
3Q	2008	Yes	2	TYTL.9	Lease Property Portfolio Management	Department audits the utilization of one lease of one non-land holding OPDIV per year	Audit summary report	TBD	OFMP

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4Q	2008	Yes	3	3.3.11	Capture accurate operations and maintenance (O&M) costs	O&M Costing Plan – Review and update annually as required by review	Report or update	Page 22, 29 and 33, Oversight of the HHS Portfolio Document	O&M Workgroup
4Q	2008	Yes	2	3.3.3c	Adjust baseline figures for HHS Performance Targets – Assess current HHS Performance Targets for utilization, mission dependency, operating costs and condition, and revise interim targets as determined necessary by the SRPO	OFMP on behalf of the SRPO to evaluate previous quarter's data to track land holding OPDIV progress towards meeting Departmental performance targets to "right size" the HHS portfolio of assets.	SRPO specific progress reports to OPDIVs	Page 19, 25 and 33 Oversight of the HHS Portfolio Document	OFMP
4Q	2008	No	2	3.3.9	Establish Standard Templates for reporting use of inventory data and performance data in day-to-day decision making for owned and leased assets	Implement use of templates to demonstrate daily decision making and results.	Status Report	Page 21, 27 and 33 Oversight of the HHS Portfolio Document	Tiger Team
4Q	2008	Yes	3	TYTL.12	Operations and Maintenance Performance Measures for Owned Assets	Department audits the operating cost of one campus of one land-holding OPDIV per year	Audit summary report	TBD	OFMP
4Q	2008	Yes	2	TYTL.13	Condition Index Performance Measures – Sustainment and Improvement Plan	Annual review and update of OPDIV sustainment and improvement plans as part of the budget cycle and detailed in Budget Technical Guidance	Final CI Tables for submission to OMB	TBD	OPDIVs
4Q	2008	Yes	2	TYTL.14	Real Property Portfolio Projects List	Annual review and update of OPDIV project lists for major capital projects; improvement projects; renovation projects; and repair projects	3-Year Timeline appendix document	TBD	OPDIVs
4Q	2008	Yes	3	TYTL.3	Budget Submissions	Prepare OMB budget submissions based on 1) Budget Technical Guidance; 2) CIRB Recommendations; 3) Final HHS Secretary's Decisions from SBC	OPDIVs OMB Budget Submissions with supporting documentation	TBD	OPDIVs with review and clearance by OFMP
4Q	2008	Yes	3	TYTL.4	ARIS Certification	OPDIVs certify the 1) accuracy and completeness of portfolio data in ARIS 2) completion of OPDIV 3-Year Timeline goals/milestones/targets (Quarterly for Landholders / Annually 4Q for non-landholders)	Signed Certification Statement with required supporting documentation for data changes; and accurate, complete transmission of the ARIS database.	TBD	OPDIVs
4Q	2008	Yes	2	TYTL.6	Real Property Portfolio Disposition/Demolition/ Lease Consolidation List	Finalize FY09 candidate property list for HHS assets	FY 2009 Report of HHS Real Property Portfolio Planned Actions	TBD	OPDIVs submit to OFMP
4Q	2008	Yes	2	TYTL.7	Real Property Portfolio Disposition/Demolition/ Lease Consolidation List	Report final results on meeting FY08 portfolio management targets	Final Annual Report for Real Property Portfolio Planned Actions	TBD	OPDIVs submit to OFMP