LA-UR-20-28918

Title:	Real Property Asset Management; Campus Planning/Real Estate Management - RPAM Corrective Action Discussion
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Intended for:	Presentation to NNSA Los Alamos Field Office for close out of Corrective Actions Plan
Issued:	2020-11-02

Real Property Asset Management
Campus Planning/Real Estate Management

RPAM Corrective Action Discussion

September 10th 2020

LA-UR-XXXX

RPAM Corrective Action discussion Background

- Transition of Triad coincided with major changes to the RPAM
  - RPAM is NNSA's guidance for implementation of DOE O 430.1C including NNSA's SD 430.1

- TRIAD was directed to develop a plan to implement new RPAM guidance

- New direction instructed TRIAD to begin developing PREP packages for all licenses and agreements

- TRIAD placed initial efforts on key Real Estate issues such as:
  - At risk agreements, leases in holdover, new required licenses

- TRIAD had received consistent unfavorable feedback in the Trimester reviews and the PEMP
  - As a result TRIAD instituted a RPAM Corrective Action Plan effort early this FY20.

- Corrective Action Plan being finalized

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Real Property Asset Management Corrective Action Plan

ISSUE: LANL does not have an adequate contractor assurance system in place for real property asset management and Triad must bring more transparency and collaboration with federal staff on issues such as infrastructure planning and execution to ensure alignment exists.

DOE O 430.1C -Management Assessment	- DOE O 430.1C - NNSA Supplement Directive 430.1 - Prime Contract - Campus Master Plan – CO Letter Status – Added Prime Contract requirements to the assessment and identified Triad activities/deliverables to meet requirements.
Communication Strategy	- Develop strategy for implementing effective communications with external and internal stakeholders; Field Office, RECO, Triad Management Final Document complete Integrating with Flad schedule

Real Property Asset Management Corrective Action Plan

P941 - Site Planning Procedure Revisions	• Complete revision of current Institutional Site Planning process • Status – IFPROG finalized procedure revisions. Document submitted to LANL's Policy Office for incorporation into the Institution's procedure set.
Real Estate Documentation Quality	• Coordinate with NNSA guidance, requirements and directives to: • Develop templates, desk guides and protocols for real estate actions • Status – Completed new format revisions for Preliminary Real Estate Plans and real estate associated documents
Real Estate Tracking and Prioritization Tool	• Develop a prioritization and tracking tool for all Real Property Actions including leases, agreement, licenses, in-grants and out-grants • Status – Currently in use, Complete & continuing to evolve as a valuable tool to all parties.

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Real Property Asset Management Corrective Action Plan

Management Training – Real Estate Actions	• Work with Field Office and RECO's to develop a presentation to provide managers and select staff on the definitions of real estate actions. • Status – Initial Draft completed by RECO's. Plan to work with LANL & LASO management on "training" sessions format and schedules.
Acquire new resources to support RPAM implementation	• Continue to grow staff currently working on Real Property Actions • Status – Two critical hires, Linda McCann and Connie Clark, on board • TechSource under contract

CAP Path Forward

- **Complete Real Estate briefings with LANL & LASO executive management**
- **Continue to utilize and evolve tools and dashboard**

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Dashboard

Functional Area	Number	Key Performance Indices	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Status
Planning and Budgeting	1	Campus Master Plan	G	G	G	G	G	G	G	G	G	G	G		Flad contract in place in August. Planning workshops completed with ALDGS; ALDPS and ALDCELS workshops scheduled for September.
	2	Pajarito Corridor Plan	G	G	G	G	G	G	G	G	G	G	G		Reviewed comment resolution with NA-LA on 08/27/20. Flad updates based on comment resolution due to IFPROG 09/11/20.
	3	P941 Revision					G	G	G	G	G	G	G	B	P941 revision completed 09/08/20. Currently working through LANL policy office rev con process to finalize and publish revised policy. Also made revisions to P941-100, Site Selection.
	4	Annual Programming Submittal	G	G	G	G	B								All data entered in G2 by February 14. FY23-27 planning will begin in December following receipt of NA-50 guidance.
Acquisition	5	Real Estate Tracking and Prioritization Tool	G	G	G	G	G	G	G	B					The Real Estate Tracking and Prioritization tool is complete and in use with regrards to all LANL real estate actions. The LANL Real Estate Team, the Field Office and the Real Estate Contracting Officers (RECOS's) have been utilizing this tool throughout its development. It has been a team effort to build and will remain a team effort to maintain, as this tool will be a continually evolving set of data, constantly updated with new actions and priorities. The feed back from our Real Estate Contracting Officers has been very positive and they now see this tool as essential to help prioritize their workloads.
	6	PREPs	Y	Y	Y	Y	Y	Y	Y	Y	G	G	G		LANL developed a new standard for PREP packages for all real estate actions. This new standard template has been well received by the Field Office and the RECO's and has been utilized on all PREP's during the past trimester. This standard will be continually updated to meet the needs of the NNSA RECO's.
	7	Leases	G	G	G	G	G	G	G	Y	Y	Y	Y		This FY the LANL real estate team has successfully executed the first new lease at LANL in over a decade. The team has also issued a request for information (RFI) with regards to new and existing office space and a subsequent request for proposals (RFP) for existing office space within fifty miles of LANL. These efforts each produced a great response from the market and the RFP process is currently working with the offerers on their best and final offers. Work on renewing existing leases has been extensive and will have LANL ahead of schedule on PREP development for upcoming renewals for the first time in many years.
	8	Annual Acquisition Plan	Y	Y	Y	R	B								Next plan due 1Q FY21.
Sustainment	9	Space Management System	R	R	R	R	R	R	R	R	Y	Y	Y		Critical hires completed in June. Team currently working on telework pilot as part of the insitutional telework policy development. The pilot is establishing telework space requirements and design standards for three buildings. Following implementation of the telework pilot, the team will focus on updating institutional space policies and developing a more robust space management system.
	10	FIMS Sustainment	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		Making progress towards completing the CAP; still working definition of real property and integration with BUILDER and environmental
	11	BUILDER Implementation	G	G	G	G	G	G	G	G	G	G	G		Currently meeting all BUILDER milestones and deliverable dates

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Dashboard

Functional Area	Number	Key Performance Indices	October	November	December	January	February	March	April	May	June	July	August	September	Status
Disposition	12	Requests for Disposition	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩		All RFDs have been completed as required.
	13	Annual Disposition Plan	🟩	🟩	🟩	🟩	🟦								FY23-27 planning will begin in December.
	14	ERI Data	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩		All ERI data has been updated per direction from NA-50
Performance Measurement and Tracking	15	Communication Strategy							🟩	🟩	🟩	🟩	🟩	🟦	Communication Strategy completed 09/09/20
	16	Management Assessment					🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟦	Management Self Assessment completed 09/08/20
	17	Monthly G2 Entry	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩		All monthly G2 entries have been completed on time.

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Management Self Assessment

DOE O 430.1C

NNSA SD 430.1

Prime Contract

DOE O 430.1C and NNSA SD 430.1 Management Self Assessment

Requirement Category	Triad's Functional Role
Planning & Budgeting	• Report monthly facility operations, maintenance, and project execution status in G2 • Prepare 5 year real property plan and budget and submit in G2 • Provide long-range planning information for NNSA's Master Asset Plan (MAP) • Assess real property against program mission requirements utilizing Mission Dependency Index (MDI) in G2
Acquisition	• Document real property acquisition plans in the Anticipated Asset Information Module (AAIM) • Prepare and submit real estate action documents such as a Preliminary Real Estate Plan (PREP) • Document efforts to meet utility metering requirements in annual Site Sustainability Plan

DOE O 430.1C and NNSA SD 430.1 Management Self Assessment

Requirement Category	Triad's Functional Role
Sustainment	• Prepare Annual Maintenance Work Plans to identify preventative and predictive maintenance activities • Maintain a Master Equipment List (MEL) in BUILDER • Perform infrastructure condition assessments every 5 years • Report monthly maintenance, repair, and renovation costs in G2 • Report annual maintenance costs and facility condition in FIMS • Use BUILDER to identify cyclical maintenance investments • Prepare annual Site Sustainability Plan

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DOE O 430.1C and NNSA SD 430.1 Management Self Assessment

Requirement Category	Triad's Functional Role
Disposition	• Identify planned disposition projects in G2 and screen/prioritize using NNSA's Excess Risk Indicator (ERI) criteria • Prepare 5 year disposition plan and budget and submit in G2 • Prepare and submit Request for Disposition (RFD) packages • Report monthly maintenance costs for retired facilities in G2 • Report annual excess facility data in FIMS
Performance Measurement & Reporting	• Maintain accurate and up to date facility and infrastructure data in the G2, FIMS, and BUILDER databases and support annual data validations

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NEW – Prime Contract Self Assessment

Requirement Category	Triad's Functional Role
Real Property Asset Management	• Implementation of DOE O 430.1C and NNSA SD 430.1
Site Planning	• Lead the development of a campus master planning process and associated planning products, including the Campus Master Plan and Area Development Plans. • Coordination of campus maser planning with M&O partners from other NNSA sites, NNSA HQ, and the NA-LA Field Office through annual and quarterly (or more frequently as necessary) planning- focused sessions. • Integrate campus master planning with NNSA program management processes, tools, and products. • Establish a bi-party integrated project team (IPT) with NA-LA to ensure campus master planning is effective and efficient with respect to NNSA programming, requirements (including NEPA), and expectations.

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Communication Strategy

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Communication Strategy

Overview	Communication Strategy Elements
Scope Summary	• Campus Master Plan (CMP) development and implementation • Strategy must address broad communications network with variety of customers and stakeholders (categories and levels of communication) • Utilization of multiple communication modes/tools
Communication Plan/Strategy elements	• Purpose and Need • Scope of Plan • CMP background and overview • Key Customers and Stakeholders • Communication strategy • Appendices (e.g., network, reference material)

Communication Strategy

| Overview	Communication Strategy Elements
Customers and Stakeholders	• NNSA (HQ, Albuquerque, Los Alamos Field Office) • Triad (Senior Management through subject matter experts) • External stakeholders • Public
Communication strategy using graded approach	• Purpose (who and why) • Nature (what) • Modes and frequency (how)

NEW – Communications Strategy Summary

Table 1: Campus Master Plan Communications Strategy Summary Table

Stakeholder	Nature and Purpose of Communication	Processes	Frequency
National Nuclear Security Administration (NNSA) NA Headquarters (NA-50, NA-10, NA-70)	**Executive Briefings/Reviews** • Deep dives • integration with MAP, G2, FIMS, and Congressional Notifications • annual budget cycles • concurrence on planning product deliverables	Formal meetings/calls with comprehensive site briefings; Congressional Notification processes; CMP/area development plan reviews; special briefings as required/requested coordinated with NA-LA management and staff	FY Q2 and Q4
NNSA Los Alamos Field Office (NA-LA) Senior Management including Contracting Officer	**Executive Briefings/Reviews** • Deep dive and other key preparations • annual budget cycles • triennial and annual M&O Prime Contract Performance Reviews • concurrence on planning product deliverables	Formal meetings/calls with comprehensive site briefings; special briefings as required; M&O Contract performance review processes; CMP/area development plan reviews	FY Q2 and Q4
Triad Executives	**Executive Briefings/Reviews** • institutional planning scope and status reviews • annual budget cycles • triennial and annual M&O Prime Contract Performance Reviews • concurrence on planning product milestones/deliverables	Formal meetings/calls with comprehensive site briefings; special briefings as required; M&O Contract performance review processes; CMP/area development plan reviews	FY Q2 and Q4
Triad Executive Officers, Associate Laboratory Directors (ALDs), Chief Operations Officers (COOs), and Program Directors	**Leadership Reviews/Planning Sessions** • institutional mission scope, space management, and strategic planning input/reviews • institutional planning scope and status reviews • annual budget cycles and project proposals • concurrence on planning product milestones/deliverables	Working meetings/calls with collaborative campus master planning focus; special briefings to evaluate and resolve issues as required; CMP/area development plan reviews	FY Q2 and as needed
Triad ALDs and Program Directors	**Strategy Reviews/Planning Sessions** • organizational mission scope, space management, and strategy planning input/reviews • organizational planning scope and status reviews • annual budget cycles and project proposals • concurrence on planning product milestones/deliverables	Working meetings/calls with collaborative campus master planning focus; special briefings to evaluate and resolve issues as required; CMP/area development plan production and reviews	FY Q1 and Q3 and as needed
Triad COOs	**Site Infrastructure and Facility Operations Reviews/Planning Sessions** • organizational infrastructure and space management strategic planning input/reviews • organizational infrastructure planning scope and status reviews • annual budget cycles and project proposals • concurrence on planning product milestones/deliverables	Formal meetings/calls with comprehensive site briefings; special briefings infrastructure and operational issues as required; CMP/area development plan production and reviews	FY Q1 and Q3 and as needed
Triad Divisions and Groups	**Functional and Operational Reviews/Planning Sessions** • organizational work execution data input/reviews • organizational planning scope and status reviews • annual budget cycles and project proposals • validation of planning product milestones/deliverables	Formal meetings/calls with comprehensive site briefings; special briefings as required; M&O Contract performance review processes; CMP/area development plan production and reviews	FY Q2 and Q4 and as needed
NNSA NA-LA/Triad Planning Managers and Subject Matter Experts (SMEs)	Ongoing planning and CMP development/implementation • defining planning requirements, processes and products (e.g., CMP/area development plans) • ongoing engagement with Prime Contracts requirements, execution, and performance • integration of planning process with SD 430.1C RPAM and other requirements • production and approval of CMP/area development plans as appropriate	Integrated Project Team (IPT) interface and working sessions per approved NA-LA LSP/Triad CMP IPT; CMP/area development plan review and approval process; Prime Contract performance review process	Monthly standing meeting and otherwise ongoing and continuous; monthly IPT meetings; based on planning product milestone/deliverables; Prime Contract performance review schedule
External Stakeholders	External planning collaboration and strategic outreach • Planning collaboration as appropriate with local municipalities, Federal, and State entities • Providing general institutional status on planning scope and status as appropriate • Facilitated interface with external regulatory entities as appropriate	Collaborative meetings/calls, presentations, press releases, website communications in coordination with NNSA and facilitated by communications experts; regulatory interface through NA-LA and Triad SMEs as appropriate	As needed and to be determined based on organizational/institutional need with specific strategy

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NEW – Conceptual Planning Schedule
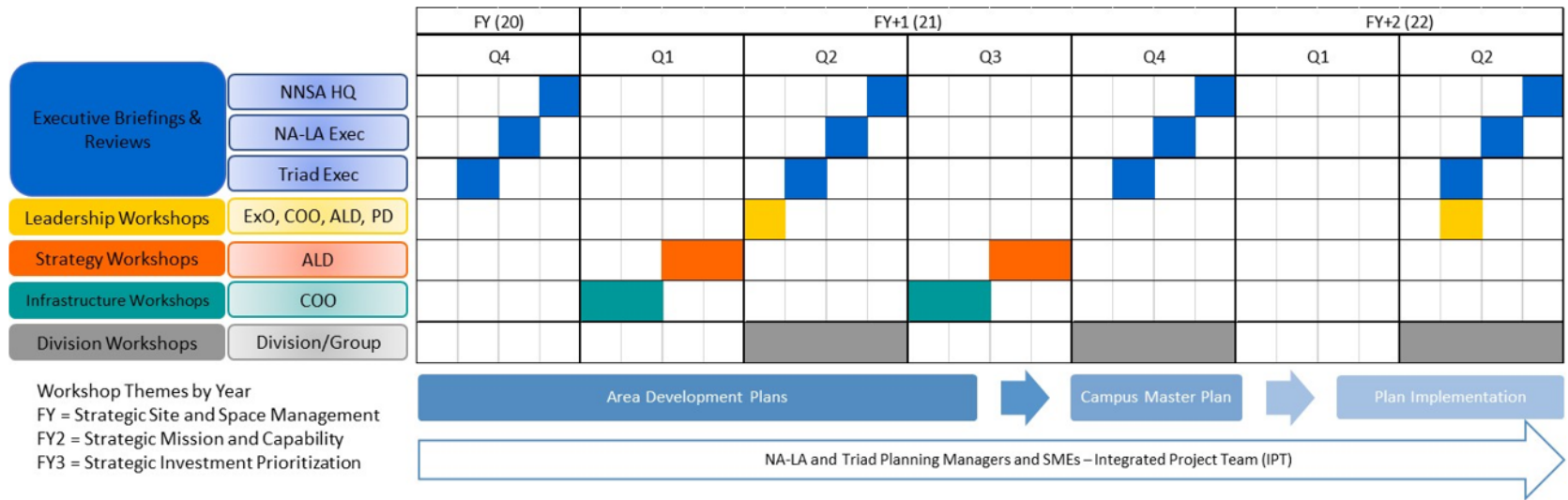
Questions

Thoughts

Discussion